



OVERSIGHT COMMITTEE MEETING

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

April 7, 2023

1:00 PM

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 Linda Martinez at (210) 272-3250.

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 3), 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.

- I. CALL TO ORDER AND QUORUM DETERMINATION
Presenter: Dr. Sammi Morrill, Committee Chair
- II. DECLARATIONS OF CONFLICT OF INTEREST
Presenter: Dr. Sammi Morrill, Committee Chair
- III. PUBLIC COMMENT
Presenter: Dr. Sammi Morrill, Committee Chair
- IV. CONSENT AGENDA (DISCUSSION AND POSSIBLE ACTION) MEETING MINUTES – February 3, 2023
Presenter: Dr. Sammi Morrill, Committee Chair
- V. BRIEFING: PROGRAMS & OPERATIONAL UPDATES (DISCUSSION AND POSSIBLE ACTION)
Presenter: Katherine Pipoly, COO
 - a. Performance, Programs, and Operational Updates
 - b. Aspen Institute
 - c. UI Weekly Work Search Contact Requirement
- VI. PROCUREMENT BRIEFING (DISCUSSION AND POSSIBLE ACTION)
Presenter: Jeremy Taub, Director of Procurement and Contracts
 - a. Small, Minority, Women and/or Veteran Owned Business Enterprises, SMWVBE Updates
 - b. Timeline and Update for Adult RFP
 - c. RFP Updates
 - d. Update on Procurement Processes
- VII. BRIEFING: QUALITY ASSURANCE (DISCUSSION AND POSSIBLE ACTION)
Presenter: Dr. Ricardo Ramirez, Director Quality Assurance
 - a. Quality Assurance Update
 - b. Monitoring Outcomes and Technical Assistance
 - c. TWC Performance – Measurable Skills Gains (MSGs) and Credential Rates
- VIII. CEO REPORT
Presenter: Adrian Lopez, CEO
 - a. SA Ready to Work Update
 - b. TWC Annual Conference Panel Submissions
- 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 recess into Executive Session for discussion on any issue for which there is an

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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 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; and**
- d. Government Code §551.074- Personnel Matters involving Senior Executive Staff and Employees of Workforce Solutions Alamo.**

XI. ADJOURNMENT

Presenter: Dr. Sammi Morrill, Committee Chair

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OVERSIGHT COMMITTEE MEETING - MINUTES

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

February 3, 2023

9:10 AM

BOARD MEMBERS: Dr. Sammi Morrill, Committee Chair (in-person), Leslie Cantu, Esmeralda Perez, Allison Greer Frances

WSA STAFF: Adrian Lopez, Katherine Pipoly, Giovanna Escalante-Vela, Penny Benavidez, Jessica Villarreal, Jeremy Taub, Chuck Agwuegbo, Dr. Federico Ghirimoldi, Dr. Ricardo Ramirez, Linda Martinez, Rebecca Espino Balencia, Manuel Marquez, Gabriella Horbach, Brenda Garcia, Roberto Corral, Manuel Ugues, Angela Bush, Aaron Smith, Rick Garcia, Terry Trevino, Trema Cote, Vanessa McHaney

LEGAL COUNSEL: None.

GUEST: None.

AMENDED AGENDA

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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.**

- I. CALL TO ORDER AND QUORUM DETERMINATION
Presenter: Dr. Sammi Morrill, Committee Chair
At 9:10 am, Chair Dr. Sammi Morrill called the meeting to order. The roll was called, and a quorum was declared present.
- II. DECLARATIONS OF CONFLICT OF INTEREST
Presenter: Dr. Sammi Morrill, Committee Chair
None.
- III. PUBLIC COMMENT
Presenter: Dr. Sammi Morrill, Committee Chair
None.
- IV. CONSENT AGENDA (DISCUSSION AND POSSIBLE ACTION) MEETING MINUTES – November 18, 2022
Presenter: Dr. Sammi Morrill, Committee Chair
Upon motion by Leslie Cantu and second by Allison Greer Francis, the Committee unanimously approved Consent Agenda Meeting Minutes for November 18, 2022.
- V. PROGRAMS & OPERATIONAL (DISCUSSION AND POSSIBLE ACTION)
Presenter: Katherine Pipoly, COO
 - a. Performance, Programs and Operational Updates
 - MPR 2022 YTD Credential Rating is an area that needs improvement. Part of the reason is due to training providers not having to provide a credential once training is complete.
 - Ready to Work has exceeded 500 participants enrolled but still needs work in this program to reach out and enroll families.
 - TWC has set a performance rate at 11,427 for FY23 in childcare. The current YTD for FY23 is 10,681 and performance is being met at 93.47%.

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- There are 568 childcare centers in the Alamo region that need to meet Texas Rising Star quality. Currently 140 centers, or 25%, have met TRS. By October 2024, all 568 centers need to be TRS certified in order to obtain the childcare scholarships. Dr. Sammi Morrill asked if the next report can include ‘Risk Factors’.
- Workforce Grants and Project Updates: SEAL program is getting a headstart this year to get agreements signed in connection with vocational rehabilitation.
- WSA has submitted an application for the Teacher Externship program for the new funding cycle and is awaiting a response.
- Disaster Recovery NDW-Winter Storm is at 99.6% of funds expended.
- Disaster Recovery NDW-COVID19 is at 89% of funds expended and is projected to fully expend the funds by March 2023.
- Jet Grant awardees have received \$1.27M in funding and 1,600 students will be served.
- Hiring Red, White & You! veterans job fair will be held in November 2023. Exact date and time to be determined.
- Career in Texas Industries program had an event with Harmony Hills ISD in January.
- FY23 WIOA Youth is on track at 50% of the annual goal.
- Ready to Work program has 525 participants in training and two pledged employers that have hired trained participants are USAA and HEB. Reach out efforts for the Ready to Work program include weekly ‘coffee calls’, tours around the city, and feedback to RTW Advisory Council.
- Summer TANF Initiative has been approved by TWC for \$800,000.

i. Program Policy Updates

- WIOA 53 Basic Skills Deficiencies – Allowable Assessments: Permit contractors to use additional assessment instruments such as CASAS, Prove It, and other similar skill assessment tools as approved by TWC.
- MR 679 Individual Training Account Policy – Allowable Training Cost: Eliminating the current funding limitation and basing allowable cost of training on average area tuition rate.
- WIOA 54 Comprehensive Objective Assessment – Basic Skills Deficiency: Reduce the TABE scoring requirements as the current requirements are too high and result in additional barriers for job seekers.

Upon motion by Allison Greer Frances and second by Leslie Cantu, the Committee unanimously approved Program Policy Updates WIOA 53 Basic Skills Deficiencies, MR 679 Individual Training Account Policy, and WIOA 54 Comprehensive Objective Assessment.

b. Aspen Institute

- Key factors aligning WSA Local Plan and Sector-Based framework: prioritizes strategies promoting systems change, partnership across

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- multiple sectors of the workforce ecosystem, and directly builds upon the best practices associated with the Sector-Based model.
- Workforce Ambassador Program launched January 2023.
- The WLA Advisory Council has about 20 advisors with 5 representing the rural communities.
- Fellow application and selection schedule: January 12 – Fellowship applications open, February 24 – Application portal closes, February 27 – Advisors connect to review applications, March 6 – WLA Advisors submit Fellow selection, March 10 – Fellows announced.
- The Fellows will be located and working within the Alamo Region with 20% in rural and 80% in urban. They will be leaders across the ecosystem, from non-profit organizations, business associations, community colleges and universities, union-based training efforts, and public agencies. They will be in a leadership position with decision-making authority, engaged in or planning workforce development, interested in designing and implementing strategies, committed to achieving equity, and eager for the opportunity.
- The Academy Timeline: March – Opening retreat, April-October – Academy sessions and collaborative labs, November – Closing retreat, December – “The Pitch” collaborative learning labs and graduation.

VI. PROCUREMENT BRIEFING (DISCUSSION AND POSSIBLE ACTION)

Presenter: Jeremy Taub, Director of Procurement and Contracts

a. ATEAMS for Teacher Externship >\$150k

- This program provides an externship for participating educators of high demand skill sets needed for the top industries and occupations; they can take this experience back to the classroom.
- The recommended Contractor will work with educators to enhance their teaching practices through professional development to create and implement externship-focused lessons.
- WSA awards the purchase of Teacher Externship Program Services to ATEAMS in the amount of \$162,500.
- The term of the contract will be effective upon award for initial twelve-month period and may be renewed contingent upon available funding.

Upon motion by Leslie Cantu and second by Esmeralda Perez, the Committee unanimously approved ATEAMS for Teacher Externship.

b. Small, Minority, Women and/or Veteran Owned Business Enterprises, SMWVBE Updates

- Current progress: online vendor registration used to collect vendor SMWVBE/HUB status, survey current vendors to self-identify, working to record childcare provider status as information becomes available, utilizing online search tools to assist in identifying vendors, continue to track and report expenditures, and SBEDA requirement with COSA with Ready to Work contract is currently meeting reporting requirements.

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- 14.75% of corporate expenditures are SMWVBE, below annual aspirational goal of 20%, but higher than 7.62% in the same period last year. 100% of SMWVBE are small businesses. There are no new vendors in October and November. 26 total vendors on file through November 30, 2022.
- For childcare providers, 317 of 557 at 56.91% have no designation and 240 of 557 at 43.09% have SMWVBE status.

c. RFP Updates

- The RV Mobile Workforce Unit is anticipated to be awarded in February 2023.
- Management and Operation of Workforce Solutions Alamo – American Job Centers for Adult Program Services is in process and anticipated award date is June 2023.
- Professional Recruitment Services is being evaluated and anticipated award date is February 2023.
- Commercial Real Estate Broker Services is in process and anticipated award date is April 2023.
- Maintenance, Electrical, and Plumbing Services are being solicited and evaluated and anticipated award dates are February 2023.
- Proposal Evaluators Services (Adult) is in process and anticipated award date is February 2023.

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

Presenter: Dr. Ricardo Ramirez, Director Quality Assurance

a. Quality Assurance Update

- TWC completed it's Annual Monitoring of WSA. The preliminary Exit Conference Report identified some areas for continuous quality improvement. The final report has not yet been received. If a report is received for Audit Resolution, then WSA will have 45 days to resolve.
- TWC is currently monitoring Child Care Services and SNAP E&T.
- WSA contracted Ms. Christine Nguyen, CPA, to provide external program monitoring services including WIOA grants (Adult, Dislocated Worker, and Youth), TANF/Choices, Child Care Services, SNAP E&T, and Ready to Work.
- Current external monitoring engagements are COSA Child Care Services and Ready to Work.
- Current internal monitoring engagements are SNAP E&T, Trade Adjustment Assistance, and National Dislocated Worker.
- Other activities include TWC's Annual Monitoring, WSA Policy Review, Asset Management, Customer/Employer Surveys, Local Plan, and One-Stop Adult RFP.

b. Monitoring Outcomes and Technical Assistance

- For FY21-22, SEAL is at 90%, Teacher Externship is at 99.3%, and Teacher Externship Stipends is at 100%.

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- Board staff offers Technical Assistance to partners when outcomes fall below expected goals. TA plans include several components such as updating policies and procedures, staff training, additional internal monitoring, and increased oversight. Successful strategic require the identification of root causes and the implementation of adequate actions.

VIII. CEO REPORT

Presenter: Adrian Lopez, CEO

- a. SA Ready to Work Update
 - WSA is conducting an analysis of the fiscal impact of the program.
 - Staff is working diligently to increase the number of participants.
- b. Population Association of American Annual Meeting 2023
 - Dr. Federico Ghirimoldi has been chosen to make a presentation at this event in April 2023.
- o Final interviews are being conducted for the CFO position. First interviews for the CIO position have been conducted.

IX. CHAIR REPORT

Presenter: Dr. Sammi Morrill, Committee Chair

X. Executive Session:

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- d. **Government Code §551.074- Personnel Matters involving Senior Executive Staff and Employees of Workforce Solutions Alamo.**

X. ADJOURNMENT

Presenter: Dr. Sammi Morrill, Committee Chair

Chair Dr. Sammi Morrill adjourned the meeting at 10:15 am.

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MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented by: Katherine Pipoly, Chief Operations Officer

Date: April 7, 2023

Subject: Briefing Regarding Programs & Performance Report

Summary: This item is to provide an update of Workforce Solutions Alamo programs and grants, including both adult, 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 services delivery and cross-collaboration and integration across WSA programs.

Analysis:

- 1) **TWC-Contracted Performance:** TWC 2022 Year-to-Date MPR performance data reflects WSA as successfully achieving 18 of 22 measures. The following measures are being monitored closely to understand ways in which to increase service delivery and improved performance:
 - A. WIOA Adult Dislocated Worker (DW), C&T Credential Rating:
 - I) Adult contractor Quality Assurance will provide credential reports to have Center Management research cases.
 - II) Credential DW: The current measure time frame up to 2nd quarter which is deficit by 2 cases. Staff obtained documentation of the credential in which DINTS were entered and have been forwarded to WSA.
 - III) C&T: The current measure time frame reflecting up to 2nd quarter which is deficit by 15 cases. During this quarter there are 24 cases enrolled in the WIOA Adult Statewide program (Women Entrepreneur Bootcamp) and 2 cases enrolled in the WIOA Youth Statewide program (Job Skill). TWC has previously indicated that these programs will not be removed from the measure.
 - B. WIOA Adult DW Measurable Skills Gains:
 - I) Adult contractor provided MSG training to all MGMT and Staff on 11.21.22 and 11.22.22
 - II) Adult contractor will reach out to Training providers to obtain appropriate documentation for MSG entry

- III) Adult: The current measure time frame up to 2nd quarter which is deficit by 14 cases.
- IV) DW: The current measure time frame up to 2nd quarter which is deficit by 3 cases.

C. WIOA Youth Credential Rating:

- I) Youth contractor has pulled the necessary data to analyze this measure reflecting majority of the in-school youth having passed their grade level.
- II) There are currently 194 cases affecting the Measurable Skills Gained (MSG) for which 132 have already collected grade reports, transcripts or diplomas and have been added to the MSG.
- III) Given the recent graduates, the contractor anticipates collecting more outcomes this week to add to the MSG and should be able to be reflected on the next MPR.

2) Child Care Performance: TWC has set Alamo's FY (Fiscal Year) 2023 Target at 11,427. Alamo is currently reflecting an annual year to date performance of 98.49%, meeting TWC performance range. Unofficial numbers for February reflected Alamo is averaging 12,350 units of care for Children enrolled in Early Learning programs, 108.08% for the month. See *Childcare Performance Memo*

Child Care Quality:

Alamo board has 144 Early Learning Programs certified as Texas Rising Star. Across the 13 counties there are 570 child development centers with agreements to offer Child Care scholarships. 25% of the centers in our local board area are certified as Texas Rising Star quality. See *Childcare Quality Memo*

Child Care Community Conversations:

- The Child Care team has been hosting community conversations throughout the 13-county area to understand the early childhood landscape, needs, resources, and impact on the workforce.
- The first community convening was held in **Kerr County** with 6 community members in attendance to include a staff from the local newspaper, the mayor, and local childcare centers
- The second community convening was held in **Frio County** with 9 community members in attendance
- A third community convening was held in Floresville, with representatives from Child Care Regulations and the local workforce boards present, and 4 members of the community attending.
- Since the last meeting Child Care team has met with **Gillespie County** hosted in Fredericksburg, with 2 community members in attendance,
- **Pleasanton County** hosted at the Pleasanton Civic Center included 3 community members in attendance, and joined by CCR staff, WSA staff & Child Care Services staff.
- **Karnes County** hosted in Kenedy in partnership with the Kenedy Housing Authority.

The collective feedback from the various community conversations has resulted in the WSA Child Care team launching a plan to ensure rural communities have access to an in-person child care representative. The child care representatives will utilize WSA rural offices, where space is available, and work with local partners in the community when a WSA center is not available. The childcare team will continue to collect information and feedback from the community conversations and the childcare staff serving in-person in the rural areas.

Special Grants & Other Initiatives:

Staff are working on a combination of state formula funded programs in addition to special initiatives and projects:

- **Summer Earn and Learn (SEAL):** Paid, on-the-job, workplace readiness training, work experience, and transferable skill learning opportunities for students with disabilities. The projected goal for FY23 is 256, and the Board has implemented the program plan earlier to exceed this goal. Since December, WSA has gathered committed employers with a diverse selection of job positions. Additionally, WSA and partners have been outreaching the community since January and have received early referrals.
- **Student Hireability Navigators** hosted an Annual Hiring Event in the Month of Oct in celebration of N-DEAM (National Disability Employer Awareness Month). This Event was in partnership with Vocational Rehabilitation and the WSA Business Service Staff for inclusive opportunities for Young Adults with Disabilities. The event served 149 individuals and had over 20 employers and community resource agencies.
- **Teacher Externship:** Partnerships among educators and 25 Independent School Districts and various industries to develop an effective workforce system by making the connection between academic skills and the workplace. WSA achieved 98% of the target, having 98 individuals successfully completing the program. WSA is exploring additional partners for the new program year to align externships with sector-based employers to enhance the learning experience for youth relative to sector industry job opportunities.
- **Disaster Recovery, NDW-Winter Storm** provides training and disaster relief employment to individuals impacted by the Texas Winter Storm of 2021. YTD, this program has supported 59 enrollees, 28 with training, and 39 supportive services. Of those participants, 24 have entered employment. As of January 31, 2023, 99.8% of funds have been expended. TWC approved the CAR request and Amendment was received by the Board in February 2023. This grant will end March 31, 2023.
- **Disaster Recovery, NDW-COVID-19** provides training and disaster relief employment (DREs) provided to individuals impacted by the COVID19 pandemic. YTD, 429 individuals have been enrolled; of these we supported 172 with Disaster Relief Employment, 93 with training, and 183 support services. Of the total participants, 147 have entered employment. As of January 31, 2023, 89.4% of the funds have been expended. In February TWC approved WSA's CAR request to move funding from ITAs to DREs. This grant will end March 31, 2023.
- **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 or obtaining higher education. Year to date, this program has enrolled 30 participants, 15 being adults (18 & over) and 15 youth. Since January 2023, 7 of these participants have entered work experience. Also, there are 6 participants that are enrolled in higher education programs, but they do not count as ITAs as they are Foster/Former Foster Youth who are receiving post-secondary education funded by the State's Education Waiver. **Correction to previous report: Contract date is October 31, 2022, through October 30, 2023.**

- **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. TWC requires an 80% completion rate monthly on providing all required services within the required timeframe of seven (7) days, WS Alamo exceeded this at 97% for most recent month and with 93.0% for BCY 2023 overall, as of the latest report.
- **Skills Development Fund Grant with Lone Star National Bank** was used to provide training in banking & finance, customer service, and leadership instruction. It enabled new hires and full-time employees to close skills gaps as well as improve career paths for participating employees. **This grant will end March 31, 2023.** The last extension of the grant contract in November 2022 was to provide time to complete training programs and submit final invoices. As of January 31, 2023, \$386,182 has been invoiced for incumbent workers training. A total of 13,629 training hours have been provided, supporting 95 new jobs and 304 upgraded jobs.
- **Job & Education for Texas (JET) Grants** provide funding for equipment necessary for the development of career and technical education (CTE) courses / programs that lead to a license, certificate or post-secondary degree in a high-demand occupation. Target applicants include Texas Public, Charter, and Windham School Districts as well as Junior, Technical, and State Colleges. For the FY2023 Application Period, the High Demand Occupation Board Confirmation Form is no longer required if the SOC targeted on the application is on the pre-approved SOC list.
 - The FY23 Grant application opened on February 7, 2023 and closed on March 14, 2023. Funding Allocation is \$7.52 million (Gen Revenue) with \$1.3 million remaining for school districts and charter schools. min/max Grant amount is \$40,000 - \$350,000.
 - WSA Youth Specialist helped several school districts and one area community college with their JET Grant application on an as requested basis.
- **Military Family Support Program (MFSP)** provides active-duty military spouses with work experience, job search assistance, support services and training. Contract date is January 1 through December 31, 2023. As of March 17, 2023, enrollment is at 12 new participants for the 2023 Grant Year and 15

still active from the 2022 contract year. 2 are enrolled in training, 6 support services provided and all 12 participate in work-ready support.

○ **Workforce Commission Initiatives:**

1. Hiring Red, White & You! The event is scheduled to be held in November 2023. WSA team is exploring local partnerships to co-host this event and leverage additional resources.
2. Texas Veterans Leadership Program (TVLP): Provides support to 2 full-time TVLP staff at two WSA Centers: South Flores & Walzem.
3. 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.

In FY 2023, WSA is shifting from one large event to several smaller, industry focused events. This will support engagement of youth at different locations 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. Tentative event dates for BCY 2023 include:

- May - Warehousing/Transportation/Healthcare
- June - IT/Cybersecurity
- August 2023 - Finance
- September 2023 - Manufacturing/Construction/Energy

For all events, opportunity and foster youth will be prioritized, with participants being connected to WIOA youth opportunities at the events.

4. Foster Care Youth Conference: This allows funds for the WSA Youth Specialist to attend the annual event and bring back best practices and opportunities to support our local service delivery. This year's conference is scheduled April 6-7th, 2023 in San Marcos, TX. The WSA Youth Program Specialist is registered to attend the Conference.
5. Childcare Short-term Training to CCS Parents (2022 WCI): Grant is specific to customers receiving childcare service through Child Care Scholarship, COSA. Staff conduct outreach via childcare reports provided by the WSA Childcare Team.

- **WIOA Youth** is on track to reach quarterly goals, with over 50% of the goals being reached within the first two months. There are currently 114 Work Agreements for Youth with 330 positions/opportunities available. The Youth Committee is also underway with the established objectives, developed priorities, and planned youth functions.

- WSA Youth Team is also working in partnership for the upcoming spring events: SAISD Senior Job Fair at PAC on April 5th, ACE Race

on April 21st at Freeman Coliseum, and 2023 Unified Practitioner Conference with UP Partnership at St. Mary's University on May 22nd.

- **Train for Jobs:** Final Closeout is pending as the completion date was December 2021. 1,561 job seekers were case managed, with short-term training provided to 565 individuals, long-term training for 588 individuals and 799 individuals were placed for an average wage of \$17.55 an hour.

COSA conducted a 100% audit and identified 8 cases resulting in disallowed costs.

- **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 enrolled 1843 individuals and has case managed / enrolled in training 845 with 115 already completing their training. 33 participants have gained employment and earn more than \$15.00 per hour. The average wage of those graduates securing employment has increased from \$18.80 to \$19.96, well above the requirement. The top training courses being selected are medical, IT and construction. *Data is from 3/31/23
 - Individuals' ineligible for Ready to Work are being connected to WSA career counselors to explore resources and supports available. Follow-up is being coordinated to provide feedback to sub primes regarding those individuals who did not qualify for Ready to Work and alternative funding supports available.
 - WSA Ready to Work received an additional award of \$21,000 from Signify / AACN platform for completing the most authorizations and PREPARE assessments.
 - WSA payment triggers for payment is at intake/assessment and once enrolled in training.
 - WSA continues to host outreach and enrollment opportunities. The Get Ready, Get Enrolled, Explore Careers and meet Employers Day is scheduled at the Neighborhood Place.

- The COSA Phase I performance review was conducted this week with no findings and positive outcomes.
- **TANF Initiative Proposal:** The proposal has been approved by the state and WSA is prepared to utilize 10% of TANF funding, for prevention programs focused on inspiring young people's interest through a unique STEM opportunity and engage with industry employers through a 12-week summer program. This program would seek to enroll 200 youth, ages 16-24 and would begin May 2023 through August 2023.

Alternatives:

No alternatives are being considered at this time.

Fiscal Impact:

No additional fiscal impact currently.

Recommendation:

Recommendation is for WSA staff to review internal processes for supporting employers and community partners in leveraging TWC funded opportunities. This includes establishing standard performance measures demonstrating the proposed program's contribution to increasing employment within the Sector Based model. WSA is also exploring the collection of data from grant funded initiatives to determine the collective contribution across existing grant programs.

Next Steps:

Next steps include continuing to monitor program outcomes, budgets and working collaboratively with the data team to understand program data to enhance services for job seekers and employers. As initiatives sunset, teams are reviewing new opportunities to secure funding supporting the WSA sector-based model.

MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented by: Katherine Pipoly, Chief Operations Officer

Date: April 7, 2023

Subject: Workforce Solutions Aspen Workforce Leadership Academy

Summary: Workforce Solutions Alamo is proud to announce our local WSA Aspen Workforce Leadership Academy (WLA), in partnership with the Aspen Institute Economic Opportunities Program (EOP). WSA is one of eight organizations selected across 24 states and Canada.

In accordance with the Local Plan, WSA has worked to create partnerships representing a diverse collection of employers, government entities and elected officials, education and training partners, economic development organizations, labor associations and organizations, and community-based and non-profit social service agencies that create an ecosystem focused on the development of the local workforce and driven by industry demand. WSA has established the agency as the convener of these partnerships and acts as a coordinating partner across multiple sectors to facilitate communication, funding, innovation, and progress. WSA's approach incorporates data collection from specific constituencies in order to create highly customized responses to the needs of target industries. This opportunity directly supports the WSA Sector-Based partnership strategy.

Aspen Leadership Academy Fellows work with leading practitioners, apply practical planning tools, strategize about applying effective strategies, and engage in leadership development. Through a Collaborative Learning Lab, academies provide a forum for local leaders to identify local and regional systems-based challenges and create shared solutions. The fellowship program supports the implementation of the WSA Local Plan in the following ways:

- WSA will employ best practices in workforce development and the WLA fellowship will strengthen leaders' capacity to develop and sustain effective workforce strategies.
- Fellows align with the WSA partnership strategy and foster a more clearly aligned workforce ecosystem that delivers integrated services to businesses and workers.
- The fellowship will expand the number and quality of leaders who advance opportunities for low-wage workers and job seekers as they meet employers' talent development needs. The Academy is employer-driven, data informed, and will help us with the implementation of our local plan.

- The Academy aligns with the WSA core values accountability (of being the convener of workforce development), collaboration (community leaders and partners), excellence, innovation (first Academy in Texas and done by a workforce board), and integrity. The WSA Board vision provides the inspiration to execute an integrated community workforce network in the nation.
- The sector-based framework of WSA prioritizes strategies that promote systems change and partnership across multiple sectors of the workforce ecosystem. Best practices associated with the Sector-Based model include:
 - The development of collaborative infrastructure with a lead agency in the role of convener or lead organization that facilitates connection with education, industry, and economic development partners with a shared vision for workforce development.
 - Transparency and communication among regional partners to promote the shared vision for workforce development.
 - Creation of a playbook to define communications plan for programs and partnerships.
 - Emphasize local wisdom and community voice in program development and evaluation.
 - Create measurable goals and objectives with culturally responsive data-gathering and evaluation processes.
 - Inform the development career pathways that address the needs of employers and jobseekers.

Twenty-four fellows were selected across the Alamo Region to represent the Workforce Leadership Academy and represent local government, community-based organizations, economic development, workforce, school districts, and private industry.

The Workforce Leadership Academy 2023 Schedule includes:

- Opening Retreat, March 29 – March 31, 2023
- 5 Working Sessions & 5 CoLabs, beginning April 10 and held monthly through October, 2023. These sessions focus on:
 - Employers
 - Metrics & Data
 - Partners & Collaboration
 - Programs Strategies
 - Policy & Funding
- 360 Leadership Assessment – September 15, 2023
- Closing Retreat, November 8th – 10th, 2023
- Stakeholder CoLab Pitch, December 4, 2023

The purpose of the monthly sessions focuses on:

- Surface Fellows' collective intelligence around needed local ecosystems changes to improve services, programs, and strategies.
- Apply systems thinking to the local workforce system.
- Reflect on, practice, and develop collaborative leadership skills.
- Deepen Fellows' knowledge of specific CoLab issue.
- Craft and present recommendations for ecosystems changes in self-selected Collaborative Learning Lab small groups.
- Engage with a broader base of local leaders to share Fellows' analysis and recommendations for action.

Analysis

No analysis has commenced at this time. Future data collection and analysis will include the impact and outcomes of the WLA. Data points and collection method to be determined in coordination with Aspen and WSA data team.

Alternatives:

No alternatives are being considered at this time.

Fiscal Impact:

The Aspen Institute Economic Opportunities Program (EOP) has awarded WSA \$50,000 in support of the Workforce Leadership Academy. WSA will utilize nonfederal funds, including Fellow sponsors and donations to invest an additional \$101,953 to support the successful implementation of the WLA in the Alamo Region.

Recommendation:

Focus efforts on preparing the WLA sessions to fully explore opportunities to strengthen our local workforce ecosystem. WSA facilitators will work with the WSA team and local partners to secure the strongest local and national subject matter experts to highlight best practices and analyze existing system processes to explore system breakdowns and enhancements.

Next Steps:

WSA team is working with Aspen WLA coach to secure guest speakers for each session based on the topics outlined above. The first session will take place virtually on Monday, April 10, 2023. WSA will continue to secure sponsorships to support the Academy.

MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented by: Adrian Perez, Chief Information Officer

Date: April 7, 2023

Subject: Unemployment Insurance Weekly Work Search Contact Requirement

Summary: The Wagner-Peyser Act requires that the state unemployment compensation system administer work test requirements. Texas Labor Code §207.021 requires UI claimants to register for work, to demonstrate the ability to work, and to be available for work. UI claimants must actively seek suitable work by making a minimum of three work search contacts per week. Commission rule allows Boards to require more than three work search contacts per week, based on a local labor market information analysis. TWC Workforce Development (WD) Letter 01-12, Change 1, dated June 23, 2021, provides local workforce areas with guidance on conducting an annual analysis by county. The Board must review the analysis and approve the recommended UI weekly job search requirements.

Analysis: Boards are required to conduct an annual analysis of the minimum number of weekly work search contacts for each county. Sources to consider when evaluating the number of work search contacts may include population, labor force and labor market information, employment opportunities, and work search requirements in neighboring or similar counties.

Alternatives: None.

Fiscal Impact: None.

Recommendation: An analysis was conducted reviewing U.S. Census demographics, Local Area Unemployment Statistics (LAUS), and industry employment growth (% and # Change) data by county. WSA also reviewed a comparison of job search requirement by county for other large boards. WSA staff recommends that the weekly work search contact requirements remain at 5 for all counties based on the unemployment rate of 3.4% for the region, and UI rates < or = to 3.4 in nine of thirteen counties, in November of 2022. Also, QCEW industry employment comparison for Q2 2021 and 2022, indicated an employment growth for all WSA counties of 52,555 with a % change of 5.0 percentage points over the year.









Next Steps: If approved, TWC will be notified of the required weekly job search contacts. Information is used by UI staff to test that UI Claimants are able, available, and actively seeking work. TWC may randomly test UI claimants job search activities. Claimants are required to keep a log that may be used to validate their job search. WSA will issue a policy record to the Adult Contractor for continued implementation.

Performance and Programs Briefing



Operational Updates

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Item	Description	On target
1	WSA continues to perform well on overall expenditures and outcomes.	
2	Measurable Skills Gained & Credential Rating for WIOA Adult	
3	Measurable Skills Gained WIOA Youth	
4	Child Care is trending at 98.49% for children served.	
5	C2 Business Service Team is hosting Employer Collaboratives, Business Service Seminars	
6	FY23 SEAL Program: Employer Agreements & Pre-Referrals	
7	Ready to Work has exceed 840 participants enrolled!	
8	National Dislocated Worker (NDW) Funding is on track to expense full investment	

MPR Performance Updates

P+ : > 105 %

MP: 97.5%-105%

MP but at risk: 95% - 97.5%

- P: <95%

AT-A-GLANCE COMPARISON - BOARD CONTRACTED MEASURES

Percent of Target (Year-to-Date Performance Periods)

FINAL RELEASE

As Originally Published 3/17/2023

JANUARY 2023 REPORT

Green = +P White = MP Yellow = MP but At Risk Red = -P

Board	WIOA Outcome Measures														
	Adult					DW					Youth				
	Employed Q2 Post-Exit	Employed Q4 Post-Exit	Median Earnings Q2 Post-Exit	Credential Rate	Measurable Skills Gains (YTD-Only)	Employed Q2 Post-Exit	Employed Q4 Post-Exit	Median Earnings Q2 Post-Exit	Credential Rate	Measurable Skills Gains (YTD-Only)	Employed/Enrolled Q2 Post-Exit	Employed/Enrolled Q4 Post-Exit	Median Earnings Q2 Post-Exit	Credential Rate	Measurable Skills Gains (YTD-Only)
Alamo	106.00%	99.35%	115.95%	103.73%	99.03%	106.35%	99.65%	111.87%	88.59%	65.16%	100.81%	102.99%	93.84%	96.65%	44.52%

**WSA is currently meeting or exceeding performance targets
For 2023 of TWC Contracted Measures**

Except:

- WIOA DW Participants Credential Rate
- WIOA Adult & WIOA Youth Measurable Skills Gains



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MPR Performance Updates

P+ : > 105 %

MP: 97.5%-105%

MP but at risk: 95% - 97.5%

- P: <95%

Percent of Target (Year-to-Date Performance Periods)

Green = +P		White = MP		Yellow = MP but At Risk		Red = -P					
Board	WIOA Outcome Measures (cont.)			Reemployment and Employer Engagement		Participation		Total Measures			
	C&T Participants			Claimant ReEmployment within 10 Weeks	Employers Rcvg Wkfc Asst Fm Bds or Self Svc	Choices Full Engagement Rate	Average # Children Served Per Day-Combined	+P	MP	-P	% MP & +P
	Employed/Enrolled Q2 Post-Exit	Employed/Enrolled Q2-Q4 Post-Exit	Credential Rate								
Alamo	98.83%	104.71%	87.17%	96.36%	106.67%	119.82%	98.43%	4	14	4	82%

WSA is currently meeting or exceeding performance targets for 2023 18 of 22 of TWC Contracted Measures

Except:

- WIOA C & T Participants Credential Rate



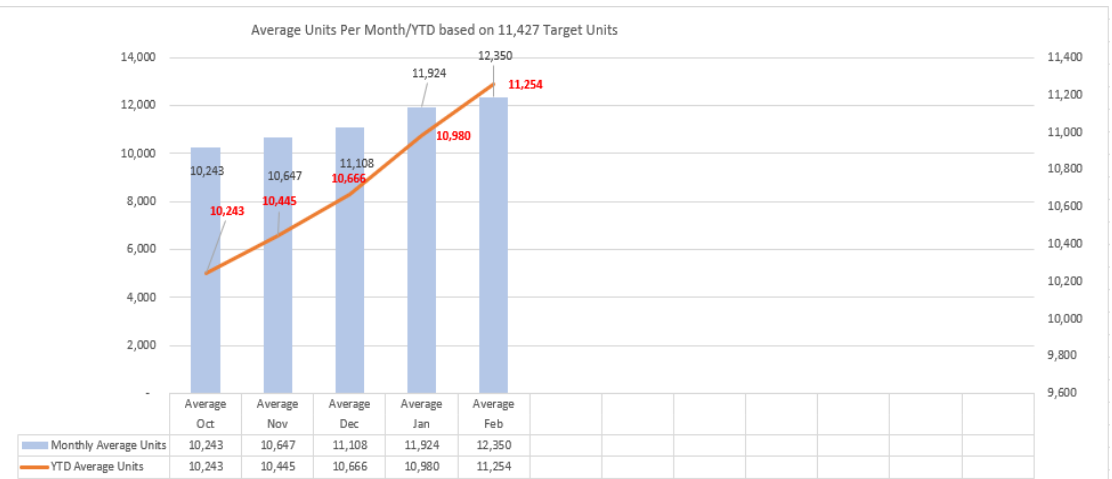
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Child Care Performance Briefing

- TWC Performance set at 11,427 for FY 2023
- Current YTD for FY 2023: 11,254
- Performance 98.49%

	Oct Average	Nov Average	December Average	Jan Average	Feb Average
Choices	237	229	209	203	201
Low Income	9,554	9,938	10,419	11,210	11,618
Former DFPS	382	401	392	419	428
Homeless	70	79	88	92	103
Monthly Average Units	10,243	10,647	11,108	11,924	12,350
Monthly % Average	89.64%	93.18%	97.21%	104.35%	108.08%
YTD Average Units	10,243	10,445	10,666	10,980	11,254
YTD % Average	89.64%	91.41%	93.34%	96.09%	98.49%
TWC Target	11,427	11,427	11,427	11,427	11,427



	Oct Average	Nov Average	Dec Average	Jan Average	Feb Average
Monthly Average %	89.64%	93.18%	97.21%	104.35%	108.08%
YTD Average Units %	89.64%	91.41%	93.34%	96.09%	98.49%



TRS Quality Centers

Alamo Region Percentage of TRS / CCS Early Learning Centers



Early Learning Center Location	Total Number of CCS Programs	TRS Programs	Percentage
Bexar Early Learning Programs (CCS)	435	122	28%
Rural Early Learning Programs (CCS)	135	22	16%
Total	570	144	25%

2023 Workforce Grants & Project Updates

Summer Earn and Learn (SEAL)

\$1.8 Million

Paid, on-the-job, workplace readiness training, work experience, and transferable skill learning opportunities for students with disabilities.

- FY23 Employer agreements are being signed
- TWC Target 256
- Early Referrals: 70
- Positions Secured: 200

Timeline: March 2023 – August 2023

Teacher Externship

\$200,000

Partnerships among educators and 25 Independent School Districts and various industries to develop an effective workforce system by making the connection between academic skills and the workplace.

- Target: 100 Teachers & 25 ISDs
- Focus on expanding rural district participation
- Launch: June 2023

New Program Year: Timeline: March 2023 - August 2023

Targeted Industries:



Manufacturing



Education



Health



IT/Cybersecurity



Construction



Finance



2022 Workforce Grants & Project Updates

Disaster Recovery, NDW-Winter Storm

\$280,952 – 99.8% funds expended

Provides Training and Disaster Relief Employment provided to individuals impacted by the Texas Winter Storm of 2021.

YTD Enrollment	Trainings Provided	Support Services Provided	Entered Employment
59	28	39	24

Timeline: May 14, 2021 - March 31, 2023



Targeted Industries:



Manufacturing



IT/Cybersecurity



Finance



Construction

2022 Workforce Grants & Project Updates

Disaster Recovery, NDW-COVID19

\$6,452,066 - 89.4% expended as of Jan 31, 2023

Provides Training and Disaster Relief Employment (DREs) provided to individuals impacted by the COVID19 pandemic.

YTD Enrollment	DREs	Training Provided	Support Services	Entered Employment
429	172	93	183	147

Timeline: May 5, 2020 - March 31, 2023

Targeted Industries:

-  Health
-  IT/Cybersecurity
-  Finance
-  Construction
-  Transportation

**Worksites are for non-profit or social services*



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	YTD Active Enrollment	Pending Enrollment	Total YTD Participants Served
12	30	20	50

Timeline: October 31, 2022 - October 30, 2023

Targeted Industries:

-  Hospitality
-  IT/Cybersecurity
-  Sales/Retail
-  Warehouse & Transportation

2022 Workforce Grants & Project Updates

Skills Development Fund (SDF) -- Lone Star National Bank \$510,967

Provides training in banking & finance, customer service, and leadership instruction for full-time employees at Lone Star National Bank to close skills gaps as well as improve career paths for participating employees. In November 2022, Grant extended for LSNB to complete all training and meet 90-day retention after training.



Total New Jobs per Contract	Total # of Jobs:- Actual	Total Training Hours
346	399	13,629

Timeline: August 2021 – March 31, 2023

Targeted Industry:  Finance



2023 Workforce Grants & Project Updates

Military Family Support Program (MFSP)

\$222,630

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

New Enrollment in CY23	Provided Training in CY23	Support Services in CY23
12	2	5

NEW Timeline: January 1, 2023 - December 31, 2023

Targeted Industries:



Health



IT/Cybersecurity



Workforce Commission Initiatives

\$354,845

Supports the following initiatives that strengthen and add value to the delivery system:

- Hiring Red, White & You!:** Veterans' Job Fair - November 2023. date and time to be determined.
- Texas Veterans Leadership Program (TVLP):** Provides support to TVLP staff at two WSA Centers: South Flores & Walzem
- Career in Texas Industries:** Provides career exploration in sector-based industries for youth. BCY23 will have a few smaller events versus 1 large event.

Timeline: October 1, 2022 – September 31, 2023

2022 Workforce Grants & Project Updates

Re-Employment Services and Eligibility Assessment (RESEA)

\$850,280

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.**

- TWC recently resumed reporting % of "RESEA services within 7 days"
 - 80% completion rate required for boards in BCY 2023
- **WSA completion rates:**
 - **97% for month**
 - **93.0 % for BCY23 overall in latest report**



Timeline: Oct 1, 2022 – September 31, 2023

2023 Workforce Grants & Project Updates

Job & Education for Texas - (JET) Grant

Purpose: Funding for equipment necessary for the development of career and technical education (CTE) courses / programs that lead to a license, certificate or post-secondary degree in a high-demand occupation.

Target Applicants:

- Texas Public Junior, Technical, and State Colleges
- Texas Independent School Districts, Charter Schools, & Windham School District.

Alamo Region Grant Applications:

- Deadline for 2023 JET Grant applications was March 14th
- \$1.3 million for school districts and charter schools
- High Demand Occupation Form from WSA Board no longer required
- WSA Youth Specialist assisting school districts and community college on an as requested basis



2023 Workforce Grants & Projects Updates

WIOA Youth - Enrollments to Date

As of February 28, 2023

WIOA YOUTH REPORT 2022-2023	Oct'22	Nov'22	Dec'22	Jan'23	Feb'23	TOTAL
Enrollments - URBAN						
In-School Youth	1	1	1	1	0	4
Out-of-School Youth	11	9	28	14	12	74
Enrollments - RURAL						
In-School Youth	1	3	1	0	2	7
Out-of-School Youth	9	14	4	1	4	32
Services						
Occupational/Vocational Training	2	6	2	5	3	18
Work Experience	7	4	4	13	8	36
Supportive Services	43	54	53	85	47	282
Educational Services (GED)	8	9	0	3	4	24



Timeline: October 1, 2022 – September 30, 2023



2023 Workforce Grants & Project Updates

WIOA Youth - Participant Planning Summary

PPS WIOA YOUTH 2022-2023	Carry Overs	NEW				YEAR END GOAL
		Q1 OCT-DEC'22	Q2 JAN-MAR'23	Q3 APR-JUN'23	Q4 JUL-SEP'23	
Urban Participants Planned	184	36	48	44	36	164
Actual New Enrollments		51	27			78
Rural Participants Planned	150	7	9	8	7	31
Actual New Enrollments		32	7			39
Work Experience Career Opportunities Planned		35	35	35	35	140
Actual		15	21			36
Educational Service (GED) Planned		5	5	6	5	21
Actual		17	7			24
Supportive Services Planned		52	52	53	52	209
Actual		150	132			282
Training Services Planned		10	10	10	10	40
Actual		10	8			18

Timeline: October 1, 2022 – September 30, 2023



2023 Workforce Grants & Project Updates



Youth Partners - Work Experience

Work Experience opportunities exist in both urban and rural areas. This contract year, 330 positions/opportunities agreements have been secured and are available to youth ages 16-24.

Current # of WEX Agreements	Student WEX Enrollment Target	Current Student WEX Enrollment to date
114	140	45



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*3.31.23

FY22/23 Goals (April – June)	WSA Applicants Interviewed	Case Managed / Enrolled in Training	Completed Training	Placed in Quality Job
	3,666	3,054	3,054	
YTD	1843	845	115	33

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



Top Trainings being selected: Medical, IT & Construction

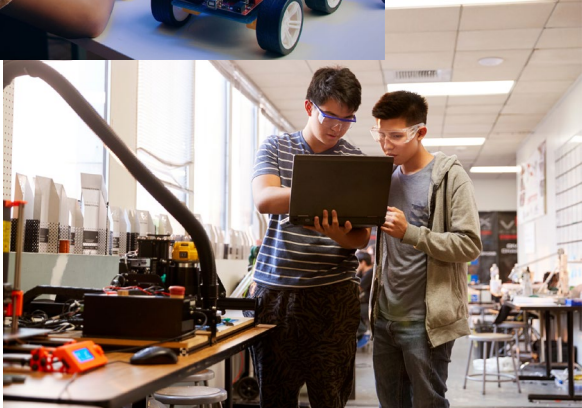
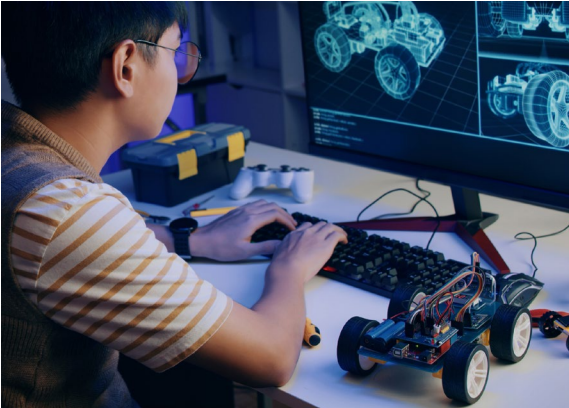
2023 Workforce Grants & Project Updates

Summer TANF Initiative

\$800,000

Alamo will inspire young people's interest through a unique STEM opportunity and engage with industry employers through a 12-week summer program.

Enrollment Target	Target Audience	Start Date	End Date
200	Youth Ages 16-24	5/01/23	8/31/23



Health



IT/Cybersecurity



Education



Manufacturing



Construction

**Pending additional TWC contract negotiations.*



Aspen Workforce Leadership Academy Goals

The Academy engages leaders in a yearlong peer learning cohort to:

- Expand and deepen professional networks and partnerships;
- Strengthen organizational and systems leadership skills;
- Apply a race and equity lens to assess and improve workforce services and strategies;
- Apply systems change framework to Fellows' work;
- Deepen understanding of effective strategies and programs; and
- Provide a forum to work collaboratively to identify local and regional systems-based challenges and create shared solutions.

Workforce Leadership Academy



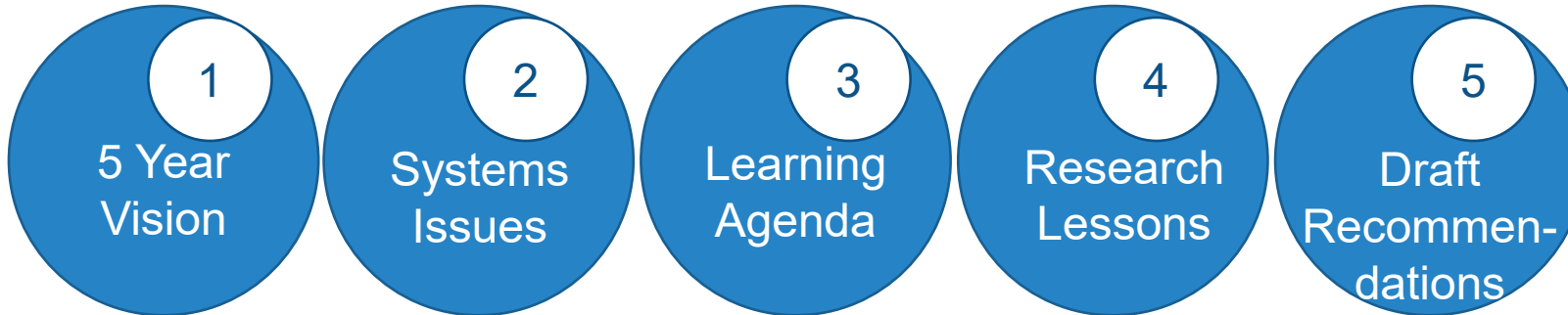
Developing a Framework for Action

Exploring Options for the Future

Recommendations for Change

Opening Retreat

Labs:



Fellows conduct local and national interviews and review research

Closing Retreat

Stakeholder Meeting

Team Meetings:



WLA Alamo - Arc of Learning

Academy Sessions

Metrics & Meaning

1. Reflect on organization's approach to data and areas for action.
2. Explore access to resources and using quantitative and qualitative data
3. Identify opportunities for disaggregating data and recognize racial and other equity disparities
4. Inform strategies that respond to the disproportionate impacts of racism and sexism.

Co Labs

1. Surface Fellows' collective intelligence around needed local ecosystems changes
2. Apply systems thinking to the local workforce system
3. Reflect on, practice, and develop collaborative leadership skills
4. Craft and present recommendations for ecosystems changes in learning labs
5. Deepen Fellows' knowledge of specific CoLab issue

Engage with a broader base of local leaders to share Fellows' analysis and recommendations for action.



Systems Changes

not a single silver bullet

Why?

Why?

To stop running into the same barrier time after time.

Changing institutional factors that affect how workers connect to jobs:

- **Business Practices** (hiring, retention, promotion, work organization)
- **Education Practices** (availability/accessibility of key skills certifications, degrees, credentials)
- **Policy Barriers** (funding, regulation of education and business)



Questions?



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Unemployment Insurance Weekly Work Search Contact Requirement

Annual Analysis, Review and Approval





Summary

The primary purpose of the weekly work search contact requirement is to assure claimant are “able, available, and actively seeking work”. Boards are required to conduct an annual analysis of the minimum number of weekly work search contacts for each county. Commission rule directs UI claimants to make a minimum of three work search contacts per week. Based on the analysis, Boards may require more than three work search requirements per week.



Work Search Requirement Yearly Analysis:

Boards may adjust the number of required weekly work search contacts at any time, as local labor market information and conditions warrant, and are required to do a yearly analysis.

Some of the factors when evaluating the number of work search contacts required may include:

- **Population**
- **Labor force/market information**
- **Employment opportunities**
- **Work search requirements in neighboring or similar counties.**



Population and Unemployment Statistics Alamo Counties

Table 1 shows:

- Continued population growth for most counties between 2010 and 2020 Decennial Census. Karnes and McMullen indicated a loss of -8% and -15% respectively.
- Population in the region increased 44,883 over the year, with a total 2020 decennial census population count of 2,671,161 and a 2021 Estimate of 2,716,044.
- The civilian labor force in Nov. 2022 was 1,304,481, an increase over the year of 6,496.
- November 2022 data indicated that the counties with the highest unemployment rates were Atascosa, Bandera, Bexar and Medina Counties
- The unemployment rate for all counties declined over the year from the November 2021 rates.

Table 1 Population, Civilian Labor Force and Unemployment

WSA Counties	Population					Civilian Labor Force	Num. Unemp.	Unemp. Rate	Over the Year Change
	Population Estimate 2021	2020 Counts	% Change (2010-2020) Counts	Population Estimate 2019	% Change 2019 to 2021 Estimates	Nov-22	Nov-22	Nov-22	Nov 21 to Nov 22
Atascosa	49,939	48,981	9%	51,153	-2.4%	22,333	852	3.8	-1.2
Bandera	21,565	20,851	2%	23,112	-6.7%	10,545	367	3.5	-0.5
Bexar	2,028,236	2,009,324	17%	2,003,554	1.2%	978,428	34,160	3.5	-0.7
Comal	174,986	161,501	49%	156,209	12.0%	82,122	2,635	3.2	-0.4
Frio	18,436	18,385	7%	20,306	-9.2%	9,079	280	3.1	-0.8
Gillespie	27,297	26,725	8%	26,988	1.1%	15,032	337	2.2	-0.6
Guadalupe	177,036	172,706	31%	166,847	6.1%	85,492	2,692	3.1	-0.5
Karnes	14,754	14,710	-8%	15,601	-5.4%	6,895	200	2.9	-1.2
Kendall	46,788	44,279	33%	47,431	-1.4%	23,534	695	3.0	-0.2
Kerr	53,161	52,598	6%	52,600	1.1%	21,914	732	3.3	-0.5
McMullen	608	600	-15%	743	-18.2%	772	12	1.6	-0.4
Medina	51,981	50,748	10%	51,584	0.8%	22,479	806	3.6	-0.5
Wilson	51,257	49,753	16%	51,070	0.4%	25,856	762	2.9	-0.7
Total	2,716,044	2,671,161	13%	2,667,198	1.8%	1,304,481	44,530	3.4	-0.6

Source: TWC/US-Census-Quickfacts-Population 2021/TWC-LAUS November 2022/TWC-QCEW Q2 2022-2021



Alamo Counties Employment & Job Demand Q2 2022

Table 2 shows:

- An over the year growth (change) in the industry employment for the 2nd Quarter 2022 for all counties except for Karnes and Frio.
- McMullen and Atascosa County indicated the highest employment growth at 26% and 12.3% respectively.
- A total over the year industry employment growth for all WSA counties of 52,555 with a percent change of 5.0 percentage points.
- Job Postings for all counties



WSA Counties	Industry Employment 2nd Q		Change		Total Job Postings June 2022 to November 2022
	2022	2021	Number Change	% Change	
Atascosa	13,832	12,322	1,510	12.3%	5,170
Bandera	3,707	3,454	253	7.3%	1,281
Bexar	893,046	852,862	40,184	4.7%	555,834
Comal	70,081	65,020	5,061	7.8%	7,589
Frio	6,591	6,618	-27	-0.4%	785
Gillespie	12,109	11,258	851	7.6%	1,478
Guadalupe	44,286	41,997	2,289	5.5%	20,896
Karnes	6,075	6,231	-156	-2.5%	781
Kendall	19,205	17,585	1,620	9.2%	4,902
Kerr	18,622	18,274	348	1.9%	2,897
McMullen	609	483	126	26.1%	125
Medina	10,336	10,118	218	2.2%	3,187
Wilson	8,921	8,642	279	3.2%	3,058
Total	1,107,420	1,054,864	52,556	5.0%	604,925

Source: TWC-QCEW Q2 2022-2021, EMSI Job Posting

Large Board Comparison

Large Boards Tarrant, Dallas, Gulf Coast, Borderplex, Lower Rio Grande have 3 weekly job search requirements for all counties.

Alamo and North Central have 5 weekly job search requirements for all counties.



Table 3: Large Board Comparison					
	Civilian Labor Force	Num. Unemp.	Unemp. Rate	Unemp. Rate	Weekly Job Search Requirements
Six Large Board Areas		Nov-22		Nov-21	2022 UI Job Search
Alamo	1,304,481	44,530	3.4	4.1	All counties 5
North Central	1,784,767	54,599	3.1	3.5	All counties 5
Tarrant County	1,148,038	38,817	3.4	4.1	All counties 3
Dallas	1,452,957	50,489	3.5	4.4	All counties 3
Gulf Coast	3,619,771	146,039	4.0	5.1	All counties 3
Borderplex	374,625	15,829	4.2	5.0	All counties 3
Lower Rio Grande	404,522	26,933	6.7	8.1	All counties 3

Source: TWC/LMCI-LAUS-November 2022, November 2021

2023 Proposed Job Search Requirement

Table 4: Weekly Job Search Requirements

TWC Weekly Job Search Requirements	Job Search Requirement 2022	Proposed Job Search Requirement 2023
3	5	5
3	5	5
3	5	5
3	5	5
3	5	5
3	5	5
3	5	5
3	5	5
3	5	5
3	5	5
3	5	5
3	5	5
3	5	5
3	5	5
3	5	5

Next Steps: If approved, TWC will be notified of the required weekly job search contacts. Information is used by UI staff to test that UI Claimants are able, available and actively seeking work. TWC may randomly test that UI claimants job search activities. Claimants are required to keep a log that may be used to validate their job search. WSA will issue a policy record to the Adult Contractor for continued implementation.



Recommendation Weekly Work Search Requirement

Proposed Work Search requirement recommendations for Alamo.
The recommendation is for the work search requirement to remain at 5 for all counties.

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Questions?

MEMORANDUM

To: Oversight Committee

From: Giovanna Escalante-Vela, CFO

Presented by: Jeremy Taub, Director of Procurement and Contracts

Date: April 7, 2023

Subject: SMWVBE Update - Procurement Diversity Program

Summary: Workforce Solutions Alamo - Board of Directors adopted a Small, Minority, Women or Veteran Owned Business Enterprises (SMWVBE) Policy in the Spring of 2021. The Board provides regular updates on SMWVBE expenditure to the Board of Directors.

Update: The current WSA – SMWVBE percentage of corporate expenditure is 13.3% for the reporting period. In the previous year, the board expenditure rate was 22.6%. Additional efforts are underway to identify the SMWVBE status of WSA's current vendors.

WSA staff is in the process of compiling the data for contracts or agreements. The data will show the contracted amounts for vendors that have a contract or agreement with WSA. The data will be used to show the percentage of implied expenditures or contracted amounts of those that are SMWVBE vendors.

Analysis: Workforce Solutions Alamo (WSA) - Procurement and Contracts Management Department makes efforts to solicit at least two SMWVBE vendors to purchase goods and services exceeding the micro-purchase threshold. To promote these efforts, WSA began utilizing various local SMWVBE search directories, including The Maestro Entrepreneur Center and The South-Central Texas Regional Certification Agency (SCTRCA), to expand outreach.

Alternatives: None.

Fiscal Impact: Workforce Solutions Alamo has an aspirational goal of 20% of expenditures to SMWVBE vendors.

Recommendation: Continue utilizing SMWVBE vendors when practicable, reasonable, and within sound business principles. The board will continue to monitor and provide regular updates on utilizing SMWVBE vendors.

Next Steps: Procurement will update the Strategic Committee and the Board of Directors periodically on the progress to achieve our stated aspirational goal of 20%.

Attachments: None

MEMORANDUM

To: Oversight Committee
From: Jeremy Taub, Director of Procurement and Contracts
Presented by: Jeremy Taub, Director of Procurement and Contracts
Date: April 7, 2023
Subject: RFP Update: Management and Operations of Adult and American Job Center Services

Summary: Workforce Solutions Alamo – Board of Directors previously approved a contract renewal for the Adult and American Job Services contract from 10/01/2022 – 09/30/2023. This was the third of three one-year renewal options in the procurement cycle of this contract and will need to be procured for the contract cycle pursuant to TWC regulations for continued services. The original contract with C2 Global Professional Services Inc., Contract No. 2022_C2A000, for Adult Services, was initiated with C2 GPS, Inc. on 10/01/2019.

Update: A separate RFQ for independent evaluators was released with a proposal deadline of February 23, 2023. Six of the nine proposals received by the deadline scored high enough to be eligible for award, and the top-three Offerors’ have been recommended to be evaluators with the highest ranked Offeror to serve as the Lead Evaluator. It is anticipated the evaluators will review proposals in accordance with the timelines below.

Analysis: The Contractor will provide the Statement of Work for the management and operations of the American Job Centers in the greater San Antonio Area. The selected Contractor will be required to work collaboratively with partner agencies to provide the seamless delivery of employment and training services throughout the 13-county area, as directed and approved by the Board. The selected Contractor will coordinate services with the City of San Antonio, the Youth Contractor, partners, vendors, and service providers as contracted by WSA.

The Contractor will be required to meet compliance with deliverables outlined in the RFP, specifically having adequate operating and management systems to provide services in the 13-county region effectively, maintaining adequate staffing to provide services, and actively participating in the collaboration and development of local partnerships. Additionally, the awarded Contractor will be required to meet or exceed the following criteria:

- Meet or exceed all TWC-contracted and local performance measures.
- Maintain fiscal integrity with a history of a clean audit to include monitoring reports with no or minimal disallowed costs.
- Meet expenditure benchmarks tied to the provision of direct services.
- Adhere to quality assurance and compliance requirements.
- Abide by all local, state, and federal regulations.

- Provide innovation and efficiencies, expanding the delivery of services that aligns with the Board’s local plan, including subsequent plan modifications.
- The contract is expected to consistently maintain a professional attitude toward customers, contractors, and Board staff.

In October 2019, a contract was executed for the Management and Operations of Workforce Solutions Alamo – American Job Centers for Adult Program Services. There are no further options to renew. A notice soliciting a Request for Proposals (RFP) was posted online and in the Texas Electronic State Business Daily (ESBD) on February 8, 2023. The posting will be open for submission for a forty-five (45) day period in accordance with the RFP timelines. Procurement and Contracts will also issue a notice to invite potential respondents to the RFP.

The proposals received by the RFP deadline will be reviewed for responsiveness and evaluated by the contracted evaluators, other Workforce Boards, non-profits, and qualified individuals. The anticipated contract term will be effective October 1, 2023, through September 30, 2024, with the option to renew for up to four (4) one-year periods upon written mutual consent of Workforce Solutions Alamo and the selected Contractor.

Alternatives: None.

Fiscal Impact: The estimated annual budget for this contract is \$19,538,000.

Staff Recommendation: To proceed with the request soliciting proposals from qualified organizations to operate and manage American Job Centers located throughout the Alamo Workforce Development Area in accordance with the proposed timelines:

Action Item	Date - Tentative
Issue/Post/Advertise Solicitation	February 8, 2023
Pre-Submittal Conference	February 22, 2023
Final Date for Questions By	February 24, 2023
Issue Final Addendum By	March 1, 2023
Solicitation Submittal Deadline	April 11, 2023
Proposal Distribution Meeting for Evaluators	April 13, 2023
Proposal Evaluation Committee Meeting	May 3, 2023
Finalists Presentations	May 8, 2023
Fiscal Integrity Review By	May 12, 2023
Lead Evaluator Recommendation Briefing to Board	May 15, 2023
Audit & Finance / Oversight Committee	May 26, 2023
Executive Committee	June 9, 2023
Regular Board Meeting	June 23, 2023

Next Steps: Pending receipt of proposals; Procurement to work with Independent Evaluators to review proposals in recommending a Workforce Service Provider.

MEMORANDUM

To: Oversight Committee

From: Jeremy Taub, Director Procurement and Contracts

Presented by: Jeremy Taub, Director Procurement and Contracts

Date: April 7, 2023

Subject: Procurement Update: Procurement & Contract Summary

Summary: This report is intended to provide a summary of active contracts the Board has approved or plans to renew or execute through March 31, 2023. Workforce Solutions Alamo Board staff processes contracts, renewals, and amendments enabling the procurement of goods and services that are reasonable and necessary to administer funds to the greater 13-county Alamo Region.

Analysis: The table below is a summary of Procurement projects in process: *(dates subject to change)*

<u>Solicitation</u>	<u>Procurement</u>	<u>Date of Release</u>	<u>Status</u>	<u>Anticipated Award Date</u>
RFP 2023-011	Custom Coach (RV) For Mobile Workforce Unit	March 10, 2023	Re-Award	April 2023
RFP 2023-002	Management and Operation of Workforce Solutions Alamo – American Job Centers for Adult Program Services	February 8, 2023	Open	June 2023
RFQs 2023-010	Proposal Evaluators Services (Adult)	February 8, 2023	Negotiation	March 2023

Workforce Solutions Alamo (WSA) Procurement and Contracts Department is responsible for managing the procurement of goods and services operations. We are committed to conducting procurement acquisitions to the maximum extent practical, in a manner providing full and open competition consistent with the standards of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance) and the Texas Workforce Commission Financial Management for Grants & Contracts’ Property, Procurement & Contract Standards. The procurement department takes necessary and affirmative steps to contract with small and minority business firms and other Historically Underutilized Businesses (HUBs) when possible.

In addition to pending procurement projects, a list of active contracts and their status is periodically presented to the Board for review. The attached list provides an update on the status of active agreements and upcoming renewals.

Alternatives: None.

Fiscal Impact: All budgeted costs were previously approved or were included in recent Budget Amendments.

Recommendation: There is no action currently recommended. Future updates to be provided and any necessary approval of the selected contractors will be requested upon completion of the RFP evaluation process for each solicitation and a recommendation is provided.

Next Steps: Procurement and Contracts will continue to proactively monitor contracts in identifying new opportunities for purchase of goods and services to leverage cost savings to WSA in support of the local plan and the mission of Workforce Solutions Alamo.

Attachments: Contract List

Status	Contract Name/Description	Vendor	Value	Start Date	Lead Date	End Date	Renewals Remaining
Active	On Call Plumbing Services	1st Aid Plumbing Inc	\$ 30,000.00	1-Mar-2023	1-Aug-2023	29-Feb-2024	2- 1 year renewal
Active	Financial Audit Services	ABIP, PC	\$ 67,050.00	1-Oct-2022	2-Jul-2023	30-Sep-2023	2- 1 year renewal
Active	S. Flores Fire and Burglar Alarm Services	ADT LLC	\$ 2,224.39	10-Nov-2022	9-Aug-2023	9-Nov-2023	Yearly Renewal
Active	Vistana Front Doorbell Service Agreement	ADT LLC	\$ 1,019.04	13-Jul-2022	13-May-2023	13-Jul-2023	Yearly Renewal
Active	Security Alarm Monitoring Svcs-Datapoint	ADT/Protection One	\$ 678.72	29-Sep-2021	30-Jun-2023	28-Sep-2023	Yearly Renewal
Active	Monitoring, Targeting and Reporting	Agility PR Solutions	\$ 24,778.00	18-Apr-2022	17-Jan-2024	17-Apr-2024	Yearly Renewal
Active	Electrical Services	All Star Electric	\$ 24,400.00	1-Mar-2023	23-Oct-2023	29-Feb-2024	No renewals remaining
Active	Teacher Externships	Alliance for Technology Educat	\$ 162,500.00	1-Mar-2023	28-Sep-2023	28-Feb-2024	No renewals remaining
Active	Subrecipient: Contracted Slots	Ascension DePaul Services, De	\$ 167,051.20	27-Jul-2022	31-Jul-2023	31-Dec-2023	2-1 year renewals
Active	RTW Subcontract	Avance PCEP School based	\$ 269,757,600.00	12-Jun-2022	12-Feb-2025	12-Jul-2025	No renewals remaining
Active	Board Book Subscription	Board Book	\$ 4,000.00	1-Sep-2022	2-Jun-2023	31-Aug-2023	Yearly Renewal
Active	Procurement Management Software	Bonfire Interactive Ltd	\$ 24,950.00	1-Dec-2022	1-Sep-2023	30-Nov-2023	Yearly Renewal
Active	Advertised Opportunities (job board)	Breezy HR, Inc.	\$ 6,375.00	24-Nov-2022	27-Jul-2023	23-Nov-2023	Yearly Renewal
Active	Adult Services	C2 Global Professional Service	\$ 19,505,316.76	1-Oct-2021	3-Apr-2022	30-Sep-2022	1- 1 year renewal
Active	Graphic Design Tool	Canva	\$ 119.40	8-Apr-2023	8-Jan-2023	8-Apr-2024	Yearly Renewal
Active	Maintenance Services	Carielo Facility Services	\$ 12,400.00	1-Mar-2023	29-Nov-2023	29-Feb-2024	No renewals remaining
Active	Case Management Solutions	CaseWorthy, Inc	\$ 25,419.48	1-Aug-2021	2-May-2023	31-Jul-2023	Yearly Renewal
Active	Adobe Creative Cloud Subscription	CCB (Consistent Computer Bargain)	\$ 1,452.00	2-Mar-2022	1-Dec-2022	1-Mar-2023	Yearly Renewal
Active	Fiscal Monitoring Services	Christine H Nguyen, CPA	\$ 136,605.00	1-Feb-2022	3-Oct-2022	31-Jan-2024	3- 1 year renewal
Active	Program Monitoring Services	Christine H Nguyen, CPA	\$ 142,840.00	12-Dec-2022	3-Aug-2023	31-Dec-2023	4 - 1 year renewals
Active	RTW Subcontract	Chrysalis Ministries	\$ 5,376,545.00	21-Jun-2022	22-Jul-2024	22-Jan-2025	No renewals remaining
Active	Child Care Management Services	City of San Antonio, Departme	\$ 88,475,343.00	1-Oct-2022	2-Jul-2023	30-Sep-2023	3- 1 year renewal
Active	Cognito Forms Enterprise License	Cognito	\$ 1,334.40	1-Sep-2022	30-May-2023	31-Aug-2023	Yearly Renewal
Active	Cognito Forms Enterprise License	Cognito	1,622.40	1-Oct-2022	30-Jun-2023	30-Sep-2023	Yearly Renewal
Active	Academic Testing Services	Comprehensive Adult Student Assessment Systems (CASAS)	\$ 4,000.00	25-Jul-2022	25-Apr-2023	24-Jul-2023	No renewals remaining
Active	VMWARE Support	Computer Solutions	\$ 29,060.28	19-May-2022	16-Feb-2023	18-May-2023	Yearly Renewal

Status	Contract Name/Description	Vendor	Value	Start Date	Lead Date	End Date	Renewals Remaining
Active	VMware technical support	Computer Solutions	\$ 10,572.72	26-Mar-2021	17-Feb-2024	17-May-2024	Yearly Renewal
Active	Subrecipient: Contracted Slots	Converse Christian School & E	\$ 182,456.80	27-Aug-2022	31 Jun 23	31-Dec-2023	2-1 year renewals
Active	Locksmith Services	Crites Downtown Lock & Key	\$ 1,595.00	1-Jan-2023	31-Oct-2023	31-Dec-2023	No renewals remaining
Active	Printer Leases	DOCUmentation	\$ 32,697.21	1-Aug-2021	3-Jun-2024	30-Nov-2024	No renewals remaining
Active	DocuSign Licenses	DocuSign	\$ 19,872.00	15-Feb-23	30-Dec-2023	14-Feb-2024	Yearly Renewal
Active	Data Analytic Software	EMSI Burning Glass Lightcase	\$ 14,500.00	9-Jan-2023	10-Oct-2023	8-Jan-2024	Yearly Renewal
Active	ArcGIS/ESRI	ESRI	\$ 200.00	6-Apr-2023	5-Jan-2023	6-Apr-2024	Yearly Renewal
Active	RTW Subcontract-Family Services	Family Services Association of SA		22-Jun-2022	23-Jan-2025	22-Jun-2025	No renewals remaining
Active	HVAC PM Services	Fixya Air, LLC	\$ 30,000.00	18 Jun 2021	19-Jan-2023	18-Jun-2023	No renewals remaining
Active	Post Machine Rental-E Houston	FP Mailing Solutions	\$ 627.00	11-Feb-2022	14-Aug-2022	10-Feb-2023	No renewals remaining
Active	Postage for VR Staff-Datapoint	FP Mailing Solutions	\$ 1,555.20	1-Oct-2020	3-Jul-2023	1-Oct-2023	Auto-Renewal
Active	Postage Machine-Kerrville	FP Mailing Solutions	\$ 1,101.84	1-Jul-2021	1-Apr-2023	30-Jun-2023	Auto-Renewal
Active	Postage Machine-New Braunfels	FP Mailing Solutions	\$ 1,101.84	1-Jul-2021	1-Apr-2023	30-Jun-2023	Auto-Renewal
Active	Postage Machine-Seguin	FP Mailing Solutions	\$ 1,101.84	1-Jul-2021	1-Apr-2023	30-Jun-2023	Auto-Renewal
Active	Postage Machine-Urban	FP Mailing Solutions	\$ 6,754.68	31-Dec-2022	4-Jul-2023	31-Dec-2023	Auto-Renewal
Active	Security Operations Center (SOC) Services	FreeIT Data Solutions, Inc	\$ 10,266,368.00	18-Jul-2022	2-Jul-2023	30-Sep-2023	No renewals remaining
Active	Safe Cabinet Filing System	Gallion Consulting	\$ 28,531.50	1-Oct-2022	3-Jul-2023	1-Oct-2023	Yearly Renewal
Active	Go Daddy Domain-WSAlamo.org	Go Daddy	\$ 42.34	13-Jun-2022	13-May-2023	13-Jun-2023	No renewals remaining
Active	Temporary Staffing Services	Human Capital International, LLC dba Integrated Human Capital	\$ 75,000.00	1-Nov-2021	2-Aug-2022	31-Oct-2022	2-1 year renewals
Active	Subrecipient: Contracted Slots	La Mission Childcare and Kid K	\$ 137,641.70	27-Jul-2022	2-Oct-2023	31-Dec-2023	2-1 year renewals
Active	Skills Development Assessment Services	LearningMate Solutions, Inc / Job Ready	\$ 60,000.00	25-Jul-2022	25-Apr-2023	24-Jul-2023	No renewals remaining
Pending	Compliance Hotline Provider	Lighthouse Services	\$ 260.00	15-May-2020	14-Feb-2023	15-May-2023	Yearly Renewal
Active	Architect and Space Planning Services	LK Design Group Inc.	\$ 149,999.99	30-Sep-2022	30-May-2023	30-Sep-2023	2-1 year renewals
Active	Temporary Staffing Services	LK Jordan	\$ 250,000.00	1-Nov-2022	2-Aug-2023	31-Oct-2023	2-1 year renewals
Active	Commercial Janitorial Services	M & Rs Elite Janitorial Solution	\$ 213,520.00	1-Oct-2021	3-Jul-2023	30-Sep-2023	4- 1 year renewals
Active	Legal Services	Martin & Drought, P.C.	\$ 90,000.00	1-Oct-2021	2-Jul-2022	30-Sep-2022	3- 1 year renewal
Active	Pest Control Services	Orkin LLC - Deborah Toth	\$ 9,333.00	22-Dec-2021	22-Sep-2022	21-Dec-2022	No renewals remaining

Status	Contract Name/Description	Vendor	Value	Start Date	Lead Date	End Date	Renewals Remaining
Active	Commerical Real Estate Broker	PCR Brokerage San Antonio LLC	\$ 120,000.00	18-Mar-2023	1-Dec-2023	12-Mar-2024	4-1 year renewals
Active	Appspace Cloud Subscription	Presidio Networked Solutions group, LLC	\$ 32,400.00	30-Jun-2023	30-Apr-2024	30-Jun-2024	
Active	Job Placement and Worksite Monitoring Services	Professional Contract Services Inc.	\$ 138,240.00	1-Oct-2022	2-Jul-2023	30-Sep-2023	No renewals remaining
Active	IX-3 Postage Meter	Quadient	\$ 4,016.61	12-Feb-2022	13-Nov-2024	12-May-2025	No renewals remaining
Active	Work Readiness Training for SEAL	SA Trainers, LLC dba Partners in Progress	\$ 80,000.00	17-May-2021	15-Feb-2022	16-May-2023	1-1 year renewal
Active	Storage Facility	Safesite, Inc	\$ 8,328.00	1-Feb-2022	4-Aug-2022	31-Jan-2023	No renewals remaining
Active	Renewal Sage Business Care	Sage	\$ 6,234.00	31 Aug 2021	03 Mar 2022	30-Aug-2023	Yearly Renewal
Active	Intake, Assesment and Case Management	San Antonio Food Bank	\$ 6,740,910.00	27-Jun-2022	28-Dec-2024	26-Jun-2025	No renewals remaining
Active	Moving Services	Scobey Moving & Storage, LTD.	\$ 15,000.00	26-Mar-2022	25-Dec-2022	25-Mar-2023	No renewals remaining
Active	Urban & Rural Youth Services	Serco of Texas Inc.	\$ 1,638,351.00	1-Oct-2021	30-Mar-2023	30-Sep-2023	3 - 1 years renewals
Active	Mat Rental Uniforms	Service Uniform	\$ 37,280.96	1-Jun-2021	1-Jan-2023	31-May-2023	1- 1 year renewal
Active	Document Destruction	Shred-It (Stericycle)	\$ 15,000.00	02 Jul 2021	02 Apr 2022	1-Jul-2023	No renewals remaining
Active	SWBCU Training Services for Staff	Southwest Business Corporation (SWBC)	\$ 3,000.00	23-Mar-2023	23-Jan-2024	23-Mar-2024	Yearly Renewal
Active	Professional Employer Services Agreement	SWBC Professional Employer Services III, LLC	\$ 30,000.00	8-May-2021	7-Feb-2022	31-Dec-2022	3- 1 year renewal
Active	Marketing & Outreach Services	Texas Creative	\$ 100,000.00	21 Feb 23	22-Nov-2023	20-Feb-2024	2-1 year renewals
Active	Guard and Security Services	Vets Securing America	\$ 369,000.00	1-Jan-2023	31-Dec-2023	22-Jun-2023	4- 1 year renewals
Active	RTW-Intake, Assesment and Case Management	The City of San Antonio (COSA)	\$ 102,390,463.00	13-May-2022	14-Nov-2024	13-May-2025	no renewals remaining
Active	Child Care Quality Improvement Act	The City of San Antonio (COSA)	\$ 1,529,733.00	1-Oct-2022	2-Jul-2023	30-Sep-2023	2-1 year renewals
Active	Procurement Consulting Services	The Syndicate Wave	\$ 76,212.00	31-Aug-2022	2-May-2023	31-Jul-2023	No renewals remaining
Active	Walzem Burglar Alarm System Services	True Protection LLC	\$ 1,877.88	1-Nov-2023	14-Jul-2024	1-Nov-2024	Yearly Renewal
Active	Language Interpreter Services	Universal Technical Translation	\$ 4,050.00	1-Jan-2023	22-Sep-2023	31-Dec-2023	No renewals remaining
Active	Web Development & Site Content Support Services	Web-Head Technologies	\$ 81,046.52	1-Nov-2022	2-Aug-2023	31-Oct-2023	No renewals remaining
Active	Leased Copier and Supplies-S Flores	Xerox Financial Services	\$ 23,582.40	1-Nov-2019	2-Aug-2024	31-Oct-2024	No renewals remaining
Active	Leased Copier and Supplies-various	Xerox Financial Services	\$ 186,035.40	1-Mar-2020	30-Nov-2024	28-Feb-2025	No renewals remaining
Active	Leased Copier and Supplies-various locations	Xerox Financial Services	\$ 62,220.00	1-Nov-2020	3-Aug-2025	1-Nov-2025	No renewals remaining

Status	Contract Name/Description	Vendor	Value	Start Date	Lead Date	End Date	Renewals Remaining
Active	Leased Copier and Supplies-Xerox C9070	Xerox Financial Services	\$ 30,420.00	1-Oct-2020	3-Jul-2025	1-Oct-2025	No renewals remaining

Subscriptions/Memberships

Vendor	Description	Cost	Start Date	End Date
1189 - WEBHEAD	ACCESIBE SOFTWARE LICENSE	\$ 2,287.36	1-Jun-2022	31-May-2023
1189 - WEBHEAD	WEBSITE HOST/PRODUCTION DEVELOPMENT	\$ 1,838.44	1-Jul-2022	30-Jun-2023
1295 - COGNITO	COGNITO FORMS	\$ 1,334.40	1-Jul-2022	31-May-2023
1367 - CANVA	GRAPHIC DESIGN SOFTWARE	\$ 119.40	8-Apr-2023	8-Apr-2024
1389 - MICROIX	MICROIX SUPPORT & MAINTENCE SOFTWARE	\$ 3,673.75	21-Aug-2022	20-Aug-2023
14 - ABILA	MIP MAINTENCE & SUPPORT	\$ 14,986.65	1-Jun-2022	31-May-2023
14 - ABILA - GAZELLE	ABILA GAZELLE SOFTWARE SUBSCRIPTION	\$ 12,075.00	1-Oct-2022	30-Sep-2023
145 - BIOMED SAN ANTONIO	BIOMED MEMBERSHIP - SURVEY WORKFORCE DATA SERVICES	\$ 1,000.00	2021	2022
156 - THE BOERNE STAR	NEWSLETTER SUBSCRIPTION	\$ 59.00	15-Sep-2022	15-Sep-2023
1734 - CARAHSOFT TECHNOLOGY CORPORATION	WORK NUMBER SERVICES EMPLOYMENT AND SSN VERIFICATION SERVICES	\$ 70,000.00	1-Sep-2022	31-Oct-2023
1798 - DOCUSIGN	DOCUSIGN	\$ 19,872.00	1-May-2022	30-Apr-2023
1846 - HOOTSUITE	Social Media Scheduling Tool Subscription	\$ 626.81	26-Sep-2022	25-Sep-2023
1867 - COMPUTER SOLUTIONS	1YR VMWARE LICENSE	\$ 29,060.28	19-May-2022	18-May-2023
1867 - COMPUTER SOLUTIONS	3YR VMWARE LICENSE	\$ 10,572.72	26-Mar-2021	17-May-2024
1991 - EXECUTIVE INFORMATION SYSTEMS LLC	SAS ANALYTICAL SOFTWARE MAINT/LIC AGREEMENT	\$ 5,454.41	30-Jun-2022	29-Jun-2023
247 - CONSISTENT COMPUTER BARGAIN	MICROSOFT OFFICE 365 SOFTWARE LICENSE	\$ 36,957.60	30-Apr-2023	30-Apr-2024
248-Constant Contact	Email outreach software	\$ 8,643.60	16-Mar-2023	16-Mar-2024
339 - EMSI	DATA ANALYTIC SOFTWARE	\$ 19,500.00	9-Jan-2023	8-Jan-2024
403 - FREEDIT	NIMBLE SUPPORT SERVICES	\$ 7,171.62	20-Jul-2022	30-Sep-2023
403 - FREEIT DATA	12 MOS SERVER DIRECTORY AUDITOR	\$ 5,786.72	1-Jul-2022	30-Jun-2023
422 - GALLION CONSULTING	CABINET LICENSE/ SUPPORT/ MAINT	\$ 24,180.00	1-Oct-2022	1-Oct-2023
544 - BARCOM	3YR WEBEX LICENSES	\$ 10,440.00	30-Nov-2021	1-Jan-2025
759 - NAWB	NATIONAL ASSOCIATION WORKFORCE BOARD MEMBERSHIP	\$ 3,000.00	1-Jul-2022	30-Jun-2023
789 - NORTH SA COC	NORTH SAN ANTONIO CHAMBER OF COMMERCE MEMBERSHIP	\$ 1,500.00	26-Oct-2022	26-Oct-2023
845 - PRESIDIO	ISR MODULAR ROUTER - ASA FIREWALL MAINTENCE	\$ 121,696.60	19-Sep-2018	18-Sep-2023
845 - PRESIDIO	APPSPACE 24MOS DIGITAL SIGNS	\$ 32,400.00	1-Jul-2022	30-Jun-2024
931 - SAGE	SAGE ASSEST LICENSE & SUPPORT	\$ 6,857.00	31-Aug-2022	30-Aug-2023
939 - SA CHAMBER OF COMMERCE	SA CHAMBER MEMBERSHIP	\$ 568.00	1-Jan-2023	31-Dec-2023
997 - SOLID BORDER	KNOWB4 IT SECURITY	\$ 8,642.25	14-Jun-2022	13-Jun-2023

PROPERTY LEASES

Location	Property Address	Tested the Market	Renewal	Expiration	Amendments	Square	Base Monthly
Walzem	4615 Walzem Rd	2016		31-Dec-23	Under Procurement	14,339	\$25,122.27
Kerrville	1700 Sidney Baker	2019	1-Apr-19	30-Apr-24	No renewals remaining	5,000	\$9,000.00
Pearsall	107 E Hackberry	2018	31-Oct-21	31-Oct-24	Month to Month up to One year	3,200	\$2,500.00
Hondo	402 Carter	2018	1-Jan-21	31-Dec-24	No renewals remaining	1,799	\$1,978.90
Pleasanton	1411 Bensdale	2018	1-Jan-23	1-Jan-25	No renewals remaining	2,344	\$2,503.66
Kenedy	491N. Sunset Strip	2018	31-Jan-22	31-Jan-25	One (1) renewal term of three (3) years	1,750	\$1,683.00
S.A. Food Bank	5200 Enrique M Barrera Pkwy		1-Jan-22	31-Dec-25	No renewals remaining	1,807	\$2,877.00
Floresville	1106 10th St	2017	1-Aug-21	31-Jan-26	No renewals remaining	2,340	\$3,450.00
Boerne	124 E Bandera Suite 401 Boerne, TX	2021	1-Nov-21	30-Nov-26	No renewals remaining	1,278	\$1,970.25
Headquarters	100 N. Santa Rosa	2017	1-Jan-17	1-Jan-27	No renewals remaining	16,352	\$30,455.60
Seguin	1411 E COURT ST	2019	16-Jan-20	31-Dec-27	No renewals remaining	6,442	\$7,086.00
South Flores	6723 S Flores St	2018	1-Aug-18	31-Jul-28	No renewals remaining	24,000	\$25,322.46
Datapoint	9725 Datapoint	2019	1-Apr-19	31-Mar-29	No renewals remaining	52,811	\$64,197.82
E. Houston	4535 E. Houston	2019	31-Jan-20	31-Jan-30	No renewals remaining	11,700	\$19,422.00
New Braunfels	183 IH-35 South	2017	1-Feb-22	31-Jan-32	No renewals remaining	6,720	\$9,223.20
Port of SA	638 Davy Crockett Rd.	2021	9-Feb-22	9-Feb-32	Two (2) renewal term of five (5) years	17,500	\$24,791.67
Marbach	7008 Marbach Rd	2016	Month to Month		None	15,000	\$18,000.00

MEMORANDUM

To: Oversight Committee

From: Jeremy Taub, Director of Procurement and Contracts

Presented by: Jeremy Taub, Director of Procurement and Contracts

Date: April 7, 2023

Subject: Update: Procurement Processes

Summary: This report is intended to summarize Procurement processes and improvements the Board is implementing to increase controls related to contracts and leases. Workforce Solutions Alamo Board Procurement staff contracted with a Procurement Consultant, The Syndicate Wave, LLC. in 2022 to help to improve processes and efficiencies.

In October 2022, 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 strengthening contracts, policies, procedures, and additional tools to implement the recommendations by TWC.

TWC Recommendations: The Board should strengthen controls over expiring contracts. The Board should adhere to the requirements of the FMGC and work with TWC Audit Resolution on re-procuring the workforce center leases for Kenedy, New Braunfels, and Hondo in compliance with federal and state requirements. To accomplish this, TWC has recommended putting in additional measures including:

- The Board should reprocure the contract for a broker before requesting additional services.
- The Board should provide documentation of cost reasonableness to demonstrate that a fair market rate is currently being paid for Pearsall, Floresville, and Boerne workforce center leases.

TWC Lease Recommendation Progress: The Board has proactively started to implement the recommendations by TWC and contacted TWC's Audit Resolution unit for additional technical assistance on how to cure the non-compliant leases before any future lease renewals. After meeting with TWC, the Board will take the following steps to cure the findings:

- WSA will perform a lease-by-lease summary of each property with required documentation to address findings with implementation of lease procedures and tools not previously in place.
- 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.
- WSA will also review all existing leases to ensure proper procurement.
- For recently exercised options, Audit Resolution may require a market analysis after the fact to make sure the lease option was the best value.

- TWC provided that original lease procurements must indicate renewal option periods. Therefore, additional option periods not included in the original lease cannot be exercised without new procurement.
- TWC acknowledged there is a significant difference between urban and rural leases. The best value in rural areas may include multiple options due to the lack of lease space in that market. Factors such as existing buildout, location, and availability of other locations are all factors that may be considered.

As an outcome of the technical assistance, the Board has taken the following steps and will provide regular updates to the Board as developments progress:

- The RFP for Real Estate Broker Services has been completed, and the contract with Partners Realty has been executed. The contract term is effective March 13, 2023, for 12 months, and has four (4) one-year options to renew.
- The Board staff is conducting an internal review of all property leases. This process analyzes the existing lease procedures to ensure they align with the TWC's Financial Manual for Grants Contracts, including the procurement supplement. In addition, this process will ensure that documentation is on file for each item listed in the Lease Procurement Checklist (**Attachment 1**).
- A preliminary review of leases has determined that similar findings for most properties would have existed. Therefore, as we implement this new procedure, quality assurance will review each lease procurement file before the recommendation is presented to Board committees (Strategic, Executive, and Full Board).
- Board staff developed a Lease Procurement Timeline with lease dates, the status of renewals or amendments, and due dates for action items. (**Attachment 3**).
- In conjunction with our legal team, the Board has standardized all leases through an addendum that will be highly enforced in the negotiation process for renewals and new 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 years' 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 identifying 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:

- 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 Improvements
- 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 Professional Development Recommendations and Training
- Support Audit reconciliation activities and any “Cure” actions

WSA and The Syndicate Wave, LLC collectively finalize all enhancements and actively implement 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 been ongoing since October 2022, and are anticipated to continue to be implemented through 2023.

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

Attachments:

1. Lease Procurement Checklist
2. Needs Determination Form
3. Lease Procurement Timeline
4. Lease Procurement Flow Chart



Lease Procurement Checklist

Name of Landlord/Contractor/Vendor:	
Property Location and Address:	
Time Frame (lease dates, etc.):	
New Contract or Renewal:	
 If Renewal, what Renewal #:	
 # of Renewals Remaining:	

Item:	Description:	Point of Contact	Start date	Completed:
1	Market Research/RFI Supplementing broker's/agents use of listing services			
2	Needs Determination			
3	Market Analysis			
4	Independent Cost Estimate Determination			
5	Board Approval of Needs Determination			
6	Solicitation Documentation			
7	Evaluation Documentation			
8	Broker/agent identifies commercial properties that meet WSA specifications			
9	Broker/agent and WSA identify which of the properties warrant site visits.			
10	Broker/agent schedules site visits and attends the visits with WSA representatives.			
11	Broker/agent further evaluates the visited properties against WSA specifications.			
12	Broker/agent requests a proposal from landlord/owner of the property or properties that best meet the specifications.			
13	Broker/agent reviews and explains the proposals to WSA.			
14	WSA reviews the broker/agent recommendation and decides whether to execute a lease.			

15	Legal/QA Audit Review			
16	Broker/agent negotiates with the landlord/owner of the property that WSA selected to include WSA lease addendum terms.			
17	Broker/agent assists WSA with the oversight of any alterations or improvements required to make space ready for grantee occupation.			
18	The broker/agent provides Market Analysis report on properties that met the specification, consideration of the properties and basis for the choice for site visits, observations made from the site visits, basis for further selection, including proposals received, broker/agent recommendation, negotiation points, and the resulting lease.			
LEASE AGREEMENT				
Evidence of Agreement Terms				
____ 3 Year Term ____ 5 Year Term				
Special Terms and Conditions List: _____ _____ _____				
Board Approval of Agreement Yes <input type="checkbox"/> No <input type="checkbox"/> Supporting Evidence: Board Meeting Minutes/				

WSA shall conduct initial market research to determine whether to supplement the use of listing services with public advertisement of the grantee’s property search.



Workforce Solutions Alamo - Needs Determination for Market Analysis on Property Lease Search Request:

The purpose of this request is to conduct market research for the lease of properties to administer workforce programs. The initial step in the planning process requires a review of existing facilities that meet our current requirements. WSA’s business needs include but limited to general location (customer populations, local business’s, area crime statistics), access to public transportation, current parking, space required, access to ground floor, ability to build out and compliance with Americans with Disabilities Act (ADA).

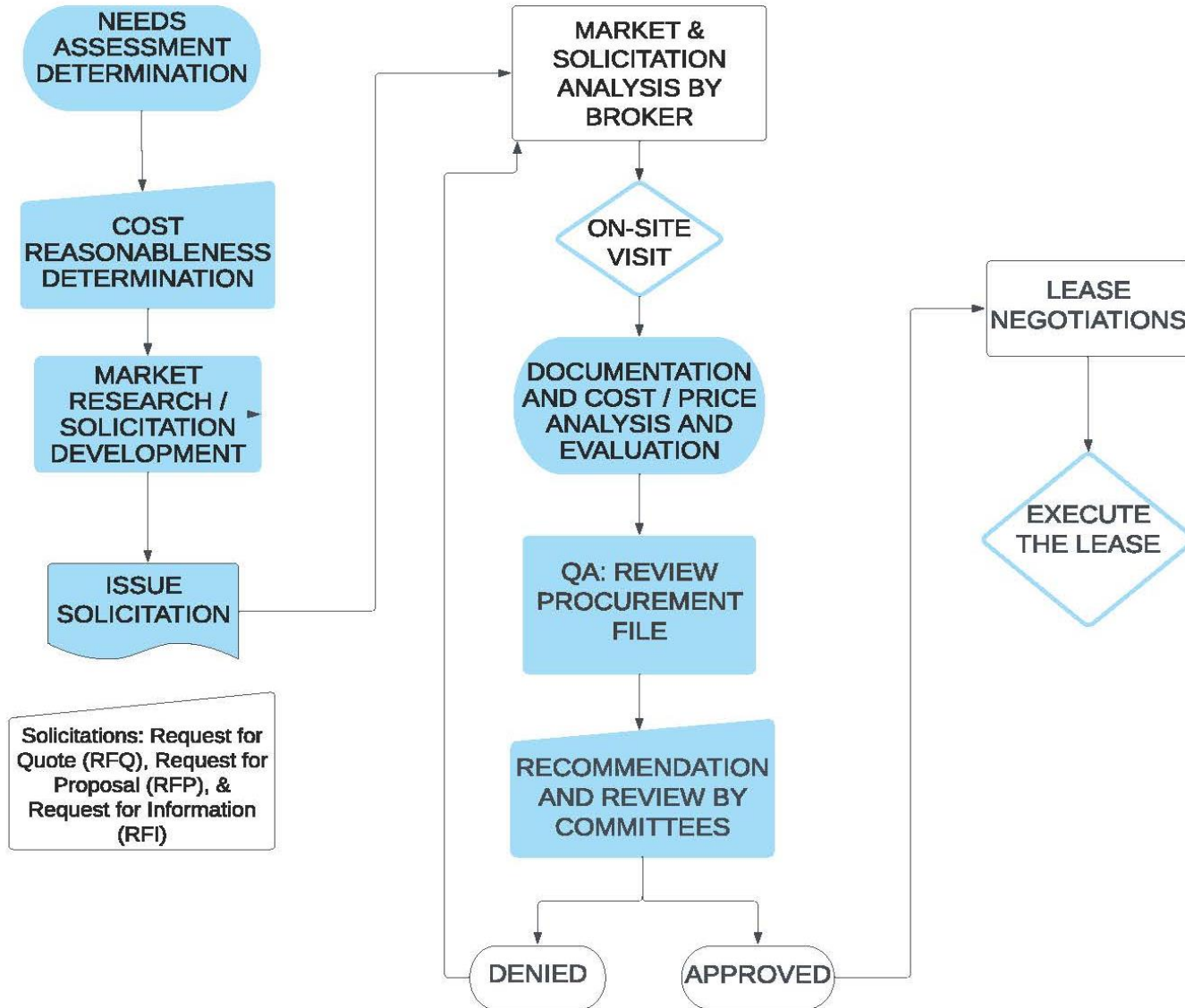
Property Location:	
Area	
Location	
Zip Code	
Existing Square Footage:	
Current Floor Plans	
Diagrams	
Square Footage Needed to accommodate staff and any integrating partners, including potential for future growth:	
Build out Specifications.	
Number of staff currently in this center (Contractor, TWC, Serco, TVC)	
Total number of VR staff integrating:	
Number of walled offices needed:	
Number of modular units needed:	
Number of conference and training rooms needed:	
Number of New Procurements, Renewal of existing:	
Number of Work Spaces, Common Places, Public Restrooms:	
Build out Specifications.	
Number of staff currently in this center (Contractor, TWC, Serco, TVC)	
Total number of VR staff integrating:	
Number of walled offices needed:	
ADA Compliance:	

Wheelchair accessibility	
Access to Public Transportation, Parking, size, space needed:	
Workforce Facility Information	
What is the expiration date of your current lease for this Workforce Solutions Office?	
Is it on a public transportation route? Yes	
Number of current parking spaces:	

WORKFORCE SOLUTIONS ALAMO
PROCUREMENT LEASE SCHEDULE OF ACTIVITIES

Location	Property Address	Needs Determination due to broker	Current Market Analysis	Market Analysis Due	Renewed	Expiration	Amendments	Initiate Procurement Checklist	Desk Top Review	Complete Checklist	Package due to Board	Termination Clause	Upload to Bonfire
Hondo	402 Carter	1-Dec-23	31-Aug-21	1-Jan-24	1-Jan-2021	31-Dec-24	One (1) renewal term of three (3) years		9-Mar-23				
New Braunfels	183 IH-35 South	1-Jan-31	27-May-21	1-Feb-31	1-Feb-22	31-Jan-32	One (1) renewal of Five (5) years		9-Mar-23				
Kenedy	491N. Sunset Strip	1-Jan-24	26-Jul-21	1-Feb-24	31-Jan-22	31-Jan-25	One (1) renewal term of three (3) years		9-Mar-23				
Walzem	4615 Walzem Rd	1-Dec-22		1-Jan-23	12-Dec-13	31-Dec-23	New Procurement	9-Mar-23	9-Mar-23				
Boerne	124 E Bandera Suite 401	1-Nov-25	14-Jul-21	1-Dec-25			Renew Every Feruary		9-Mar-23				
Floresville	1106 10th St	1-Jun-25	26-May-21	1-Jul-25	1-Aug-21	31-Jul-26	One (1) renewal of Five (5) years	31-Jul-25	9-Mar-23				
Pearsall	107 E Hackberry	1-Oct-23	31-Jul-21	1-Nov-23	31-Oct-21	31-Oct-24	Month to Month NOT TO EXCEED 12 Mo	31-Oct-23	9-Mar-23				
Kerrville	1700 Sidney Baker	1-Mar-23		1-Apr-23	1-Apr-19	1-Apr-24	One (1) renewal term of five (5) years	1-Apr-23	1-Apr-23				
S.A. Food Bank	5200 Enrique M Barrera Pkwy	1-Dec-24		1-Jan-25	1-Jan-22	31-Dec-25	Two (2) renewal term of one (1) years	31-Dec-24	1-Apr-23				
Pleasanton	1411 Bensdale	1-Dec-24	1-May-21	1-Jan-25	1-Jan-23	1-Jan-25	No renewals remaining	1-Jan-24	1-Apr-23				
Headquarters	100 N. Santa Rosa	1-Mar-26		1-Apr-26		16-Mar-27	One (1) renewal term of five (5) years		1-Apr-23				
Seguin	1411 E Court Street	1-Dec-26		1-Jan-27		31-Dec-27			1-Apr-23				
South Flores	6723 S Flores St	1-Jul-27		1-Aug-27	1-Aug-18	31-Jul-28	four (4) renewal terms of (5) years		1-Apr-23				
Datapoint	9725 Datapoint	1-Nov-28		1-Dec-28	1-Dec-19	30-Nov-29	four (4) renewal terms of (5) years		1-Apr-23				
E. Houston	4535 E. Houston	1-Jan-29		1-Feb-29	31-Jan-20	31-Jan-30	Two (2) renewal term of five (5) years		1-Apr-23				
Port of SA	638 Davy Crockett Rd.		28-Feb-21		9-Feb-22				1-Apr-23				
Fredericksburg	Hill Country University	N/A					MOU		1-Apr-23				
Bandera	702 Buck Creek	N/A					MOU		1-Apr-23				
Marbach	7008 Marbach Road	N/A					Month to Month with no amendments		1-Apr-23				

LEASE PROCUREMENT FLOW CHART



Procurement and Contract Updates

April 7, 2023

Jeremy Taub, Director of Procurement and Contracts Management





Discussion and Possible Action on RFP in Process and Contracts Update.



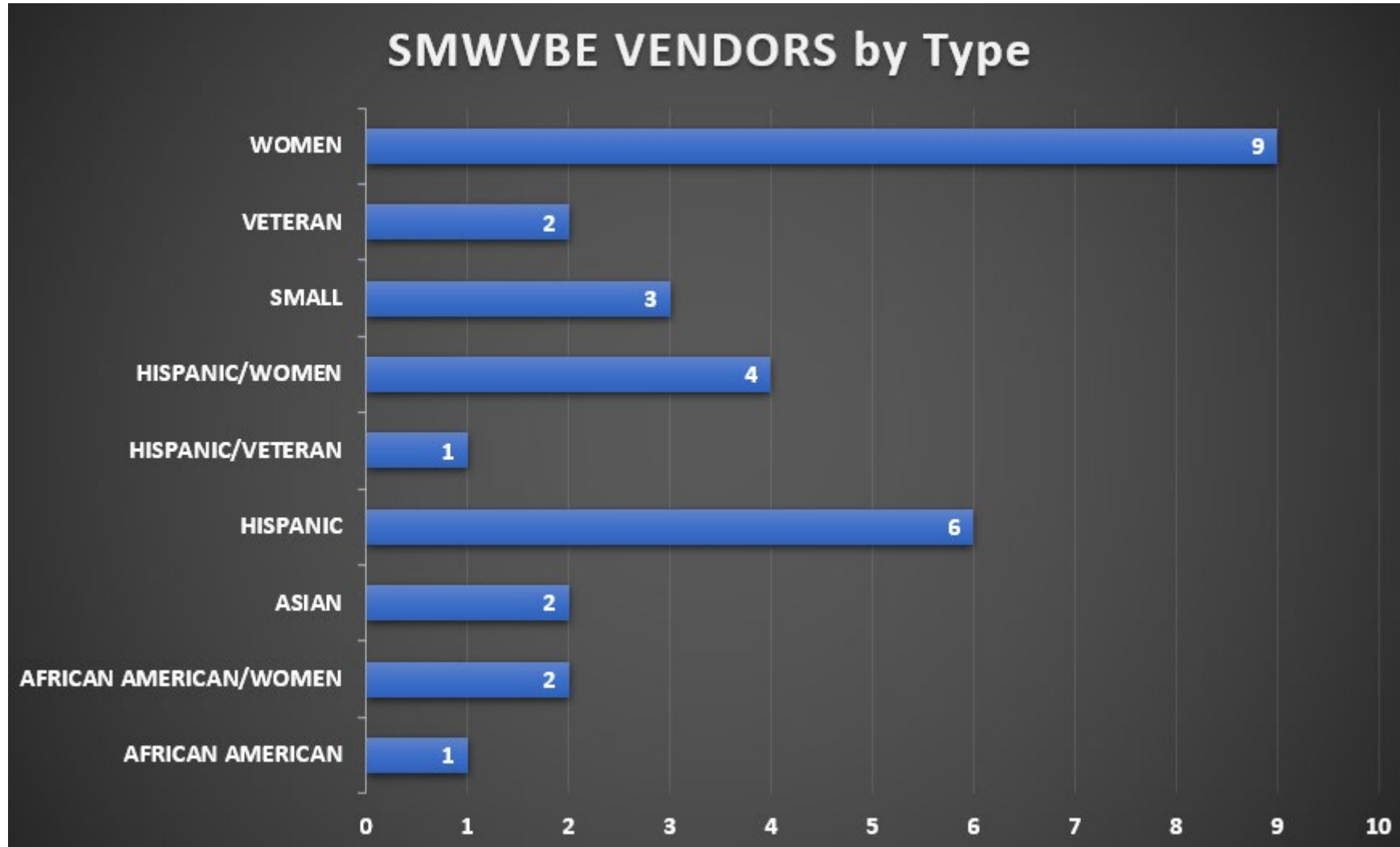
SMALL, MINORITY, WOMEN AND/OR VETERAN OWNED BUSINESS ENTERPRISES, DIVERSITY PROGRAM

Highlights:

- Online vendor registration is used to collect vendors' SMWVBE/HUB (Historically Underutilized Business) status.
- Additional outreach is underway to survey all current vendors that involves obtaining a list of all vendors in our database that are not identified as SMWVBE so they can update their status if applicable.
- Utilizing online search tools such as various local SMWVBE search directories to expand outreach:
 - The Maestro Entrepreneur Center
 - The South-Central Texas Regional Certification Agency (SCTRCA)
- Providing demographic information on the Child Care Providers received from the contractor (City of San Antonio).

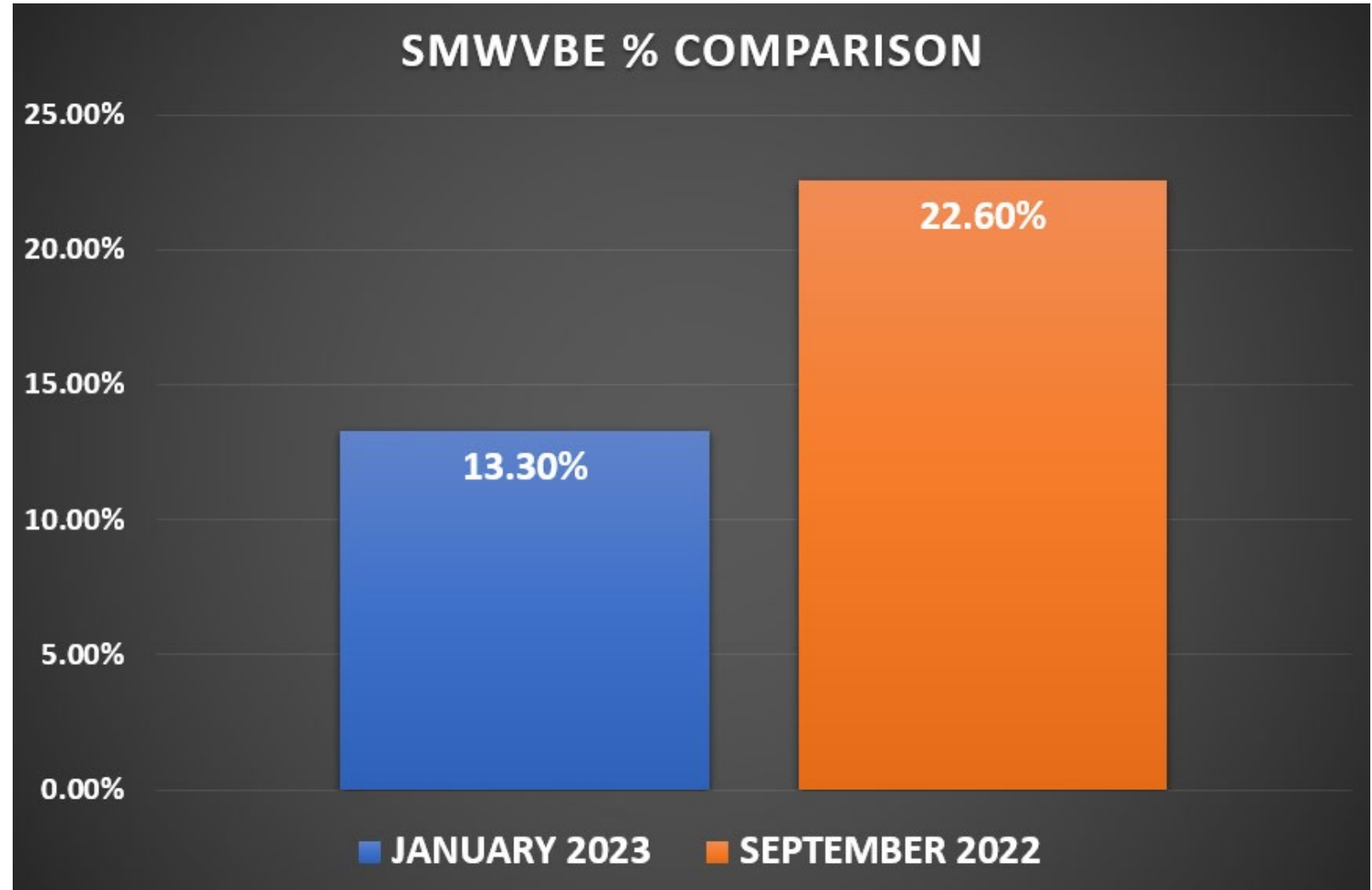


SMWVBE – 30 TOTAL VENDORS BY CLASSIFICATION



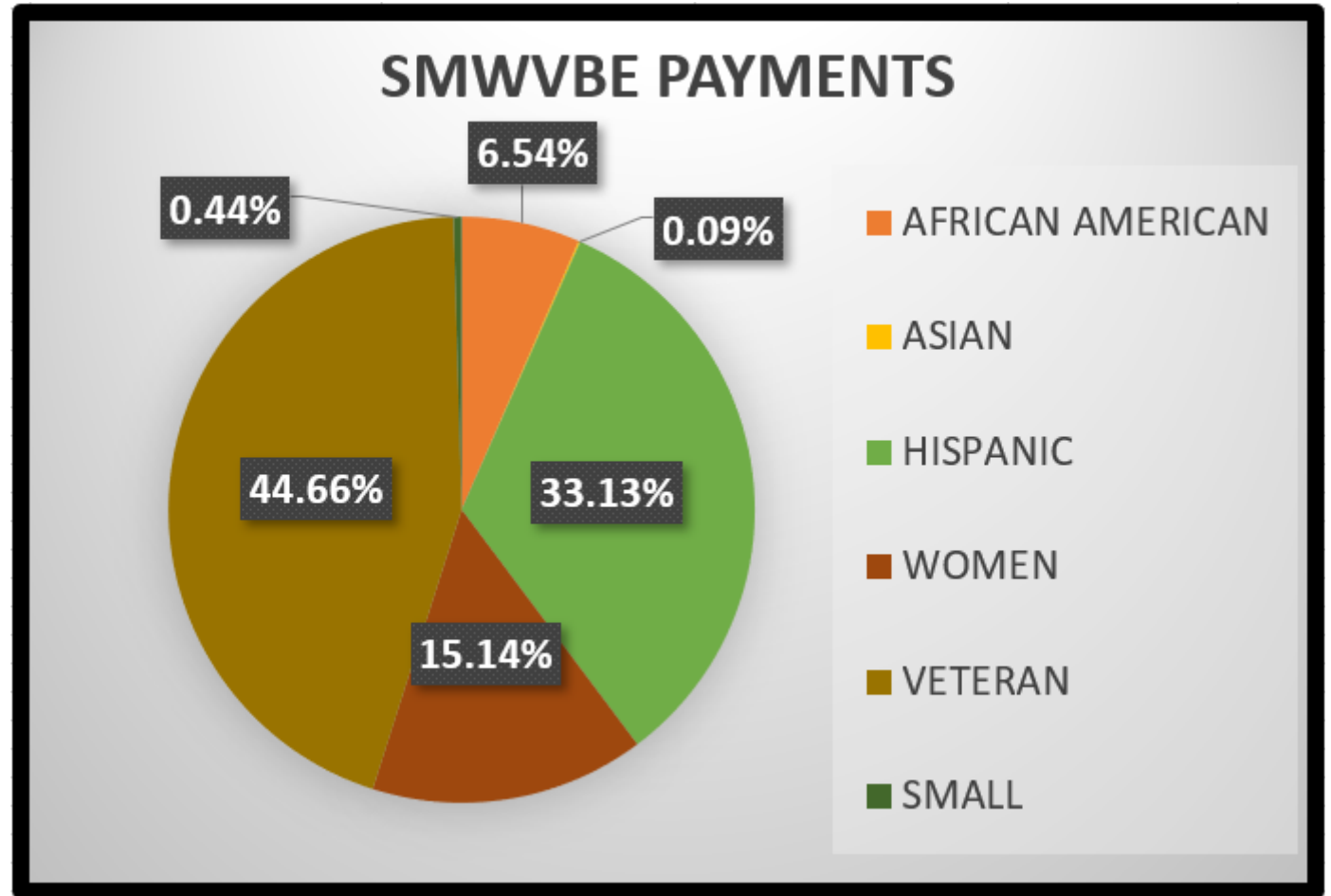
SMWVBE PERCENTAGE COMPARISON BY DATES

- As of January 31, 2023, WSA is at 13.3% of total expenditures.
- Fiscal year ending September 30, 2022, WSA was at 22.6% of total expenditures.



SMWVBE PERCENTAGE OF PAYMENTS

SMWVBE STATUS	SMWVBE PAYMENTS
AFRICAN AMERICAN	\$ 19,913.60
ASIAN	288.05
HISPANIC	100,844.30
WOMEN	46,072.04
VETERAN	135,919.79
SMALL	1,332.50
TOTAL	\$ 304,370.28



Current Board and Facility SMWVBE expenditures are at 13.3%, which is below WSA's aspirational goal of 20%.



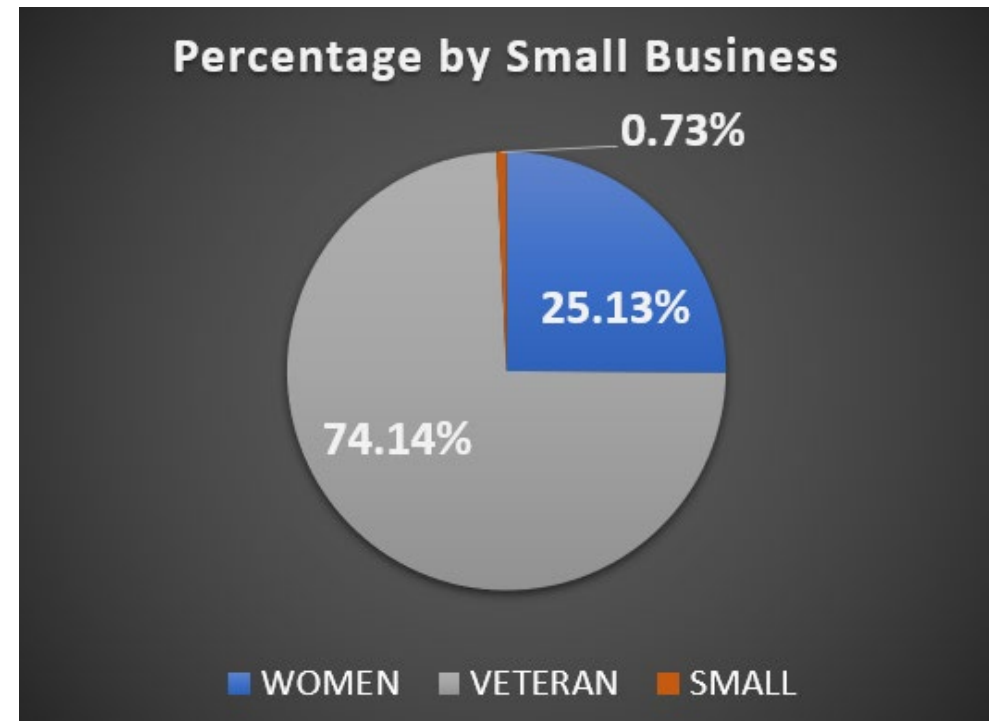
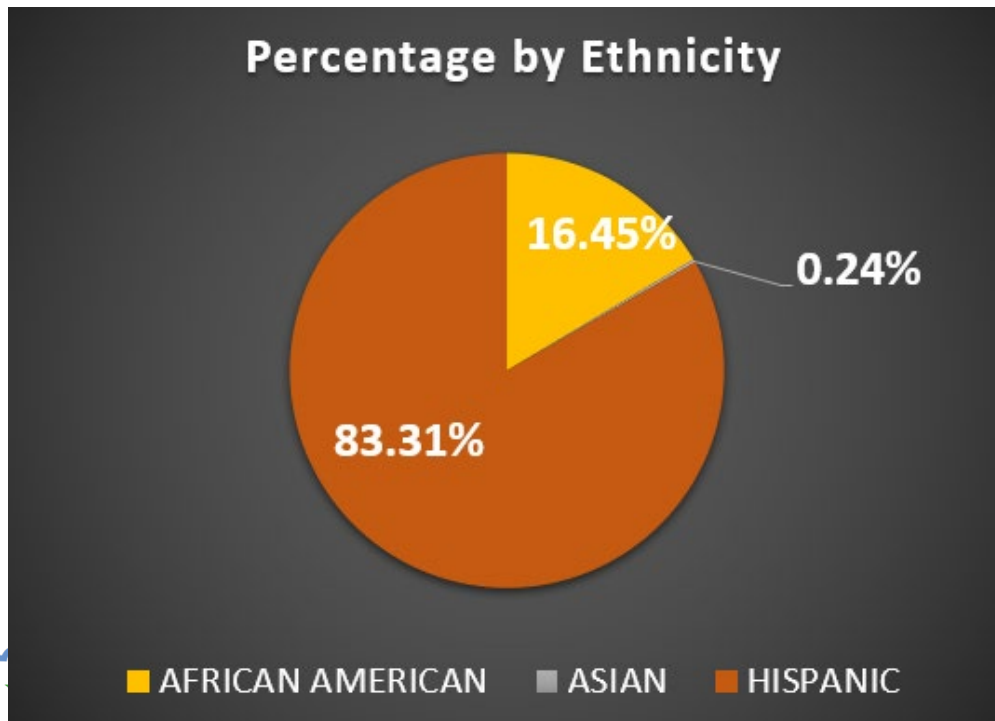
SMWVBE PERCENTAGE BY ETHNICITY & SMALL BUSINESS

Ethnicity

African American	16.45%
Asian	0.24%
Hispanic	83.31%
Total	100.00%

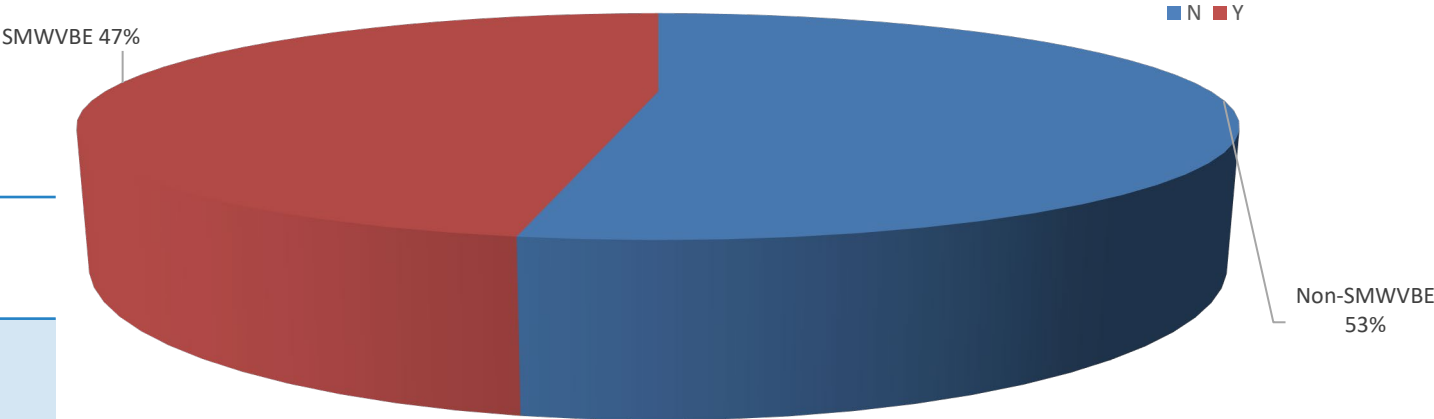
Small Business

Women	25.13%
Veteran	74.14%
Small	0.73%
Total	100.00%



ESTIMATED ANNUAL SMWVBE EXPENDITURES BY CONTRACT

**Common operating term contracts	SMWVBE	Non-SMWVBE	Total
No. of active term contracts	20	46	68
Estimated Annual Expenditure by Dollar	\$1,774,907	\$1,999,605	\$3,778,229
Contracts % by Estimated Expenditures	47%	53%	100%



SMWVBE CLASSIFICATION OF CHILD CARE PROVIDERS

of Providers by Classification

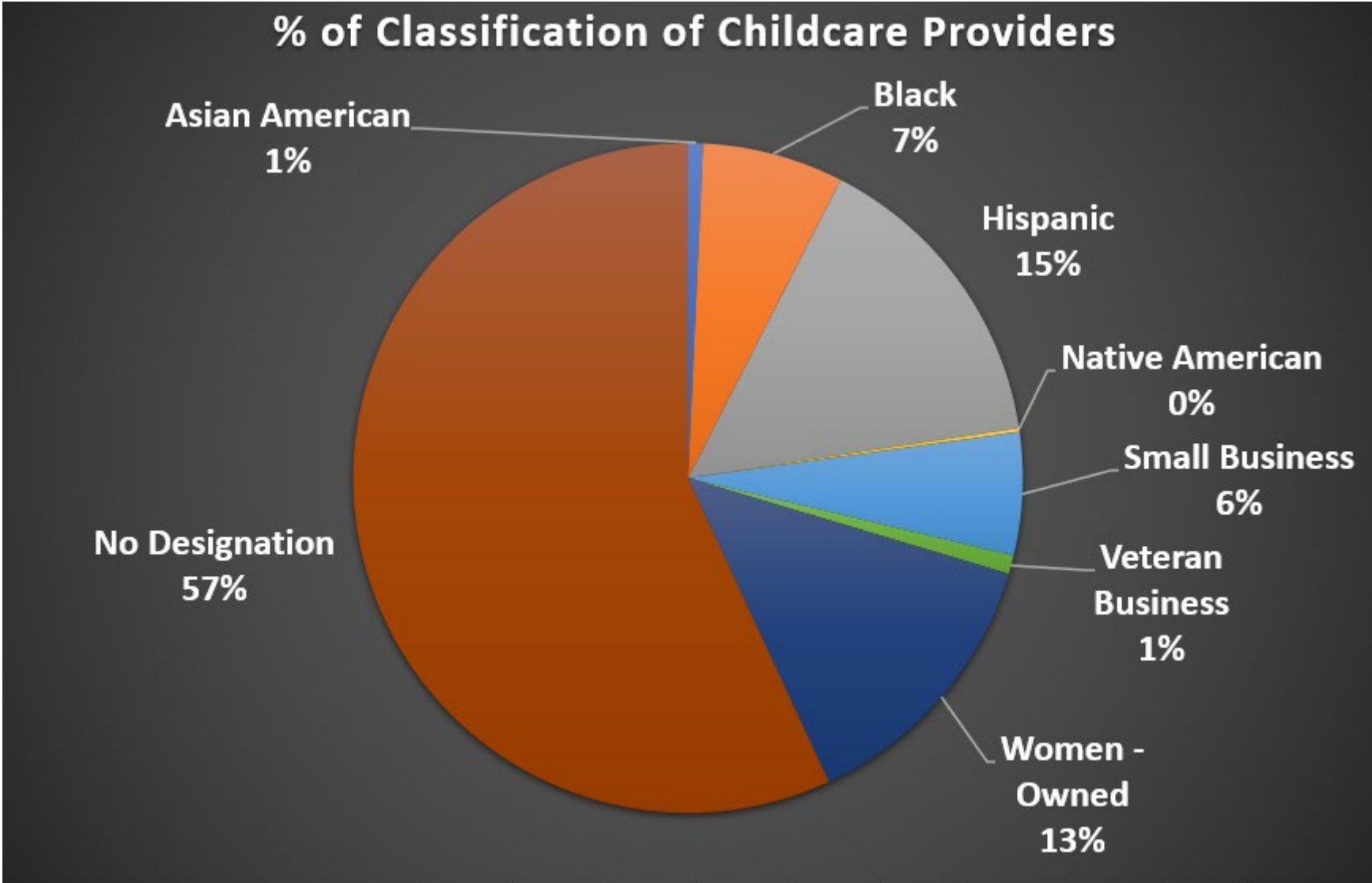
No-Designation	322
Hispanic	87
Women - Owned	76
African American	38
Small Business	33
Veteran Business	5
Asian American	4
Native American	1
Total	566

% of Expenditures by Classification

No-Designation	48.88%	\$ 14,939,725.09
Women - Owned	20.10%	6,141,934.25
Hispanic	14.42%	4,406,580.40
Small Business	7.93%	2,423,250.66
African American	7.30%	2,230,919.09
Veteran Business	0.83%	254,852.70
Asian American	0.36%	111,070.76
Native American	0.18%	54,274.50
Total	100.00%	\$ 30,562,607.45

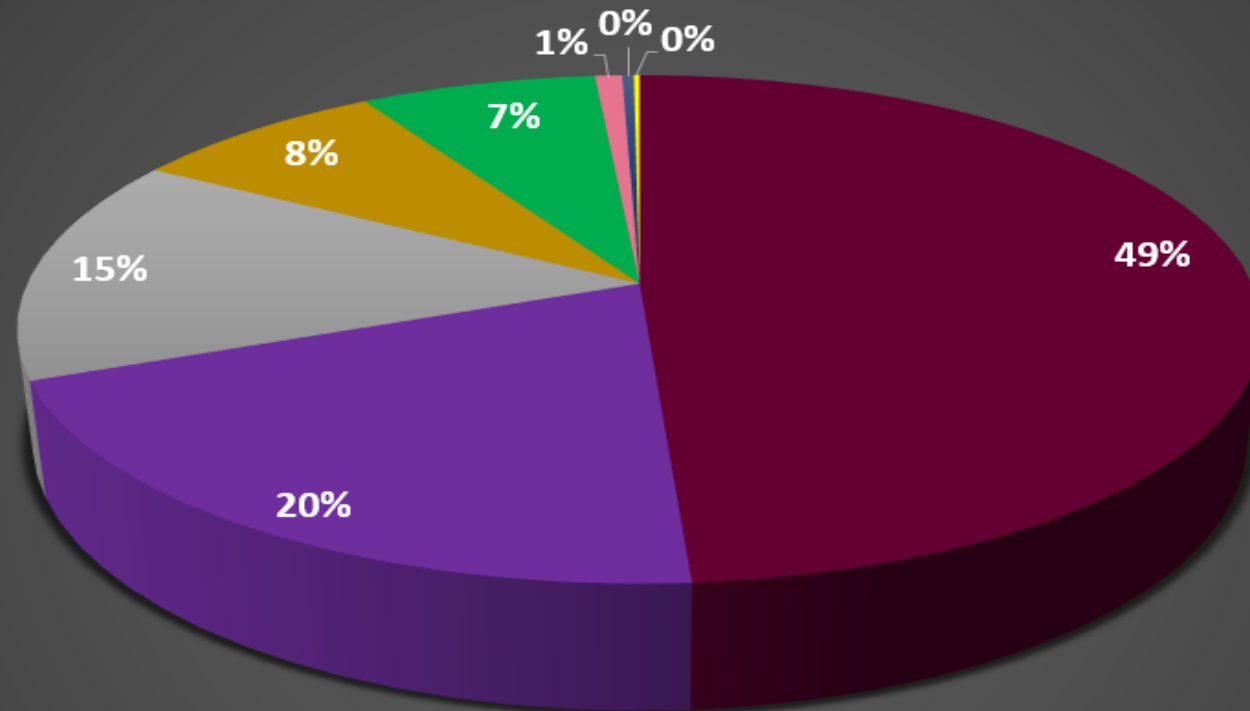


SMWVBE CLASSIFICATION OF CHILD CARE PROVIDERS



% OF EXPENDITURES BY SMWVBE CLASSIFICATION OF CHILD CARE PROVIDERS

% OF EXPENDITURES BY CLASSIFICATION



No-Designation

Women - Owned

Hispanic

Small Business

African American

Veteran Business

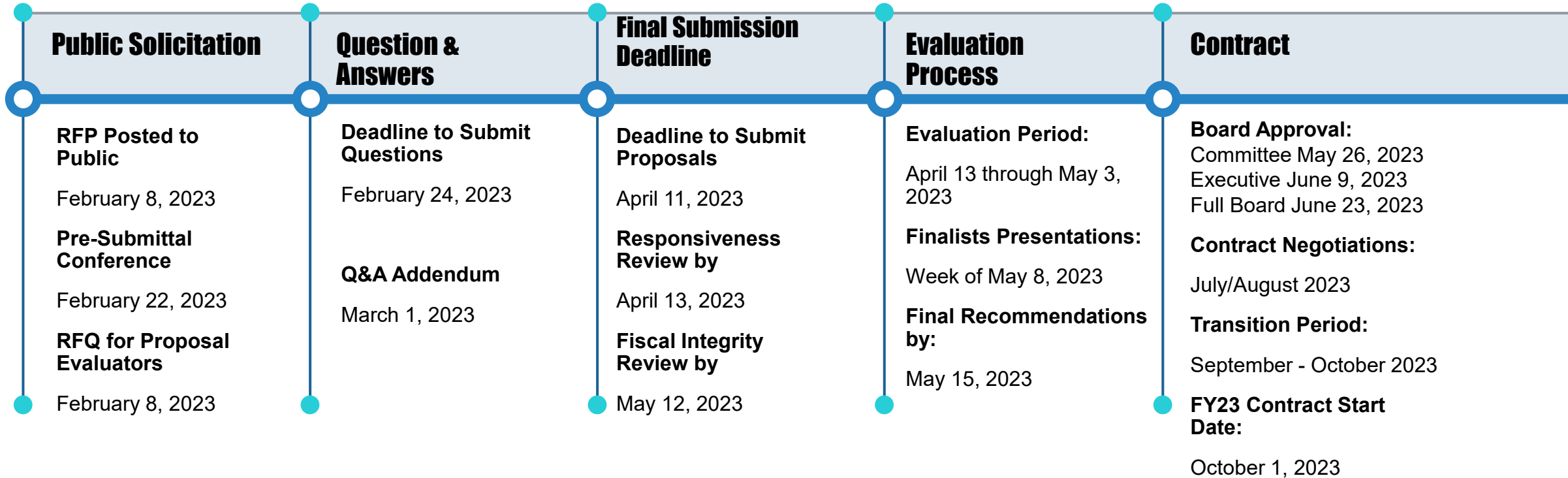
Asian American

Native American



ADULT SERVICES RFP TIMELINE

Management and Operations of Adult Programs



**All dates are tentative and subject to change*

RFP - Request for Proposals

- The table below is a summary of projects WSA Procurement is currently working on:

<u>Solicitation</u>	<u>Procurement</u>	<u>Date of Release</u>	<u>Status</u>	<u>Anticipated Award Date</u>
RFP 2023-001	Custom Coach (RV) For Mobile Workforce Unit	March 10, 2023	Re-Bid	April, 2023
RFP 2023-002	Management and Operation of Workforce Solutions Alamo – American Job Centers for Adult Program Services	February 8, 2023	In-Process	June, 2023
RFQs 2023-010	Proposal Evaluators Services (Adult)	February 8, 2023	Contract	March 31, 2023

FY21 TWC IDENTIFIED AN AREA OF CONCERN

FY21 Concern: The monitoring results identify potential administrative concerns around the Board needing to follow federal and state guidelines for procurement consistently.

Board Response: As a proactive measure, the Board contracted Alfred Turner and The Syndicate Wave to evaluate current policies and procedures, make recommendations to strengthen the current system, and implement best practices and controls around procurement.



FY22 TWC FINANCIAL MONITORING

Review Period: July 1, 2021 – June 30, 2022

Response to TWC Due: April 7, 2023

Fiscal Impact: There are no disallowed or questioned costs, but the Board **MUST** strengthen controls around the procurement of leases and expiring contracts.

Leases-Related Findings: The Board must comply with procurement requirements for six workforce center lease renewals.

TWC FINANCIAL MONITORING

Contract-Related Findings: The Board should strengthen controls around expiring contracts.

Contract Issue #1: The real estate broker provided services with an expired contract.

Contract Issue #2: The monitoring contract was extended 90 days beyond the available renewals provided in the initial procurement.

The 90-day extension was due to the procurement not being completed with adequate time before the contract expired.

TWC FINANCIAL MONITORING

TWC Audit Resolution Team:

Board staff requested technical assistance from TWC's Audit Resolution division and developed the following outcomes:

- The Board should procure the Real Estate Broker Services before any additional services are requested.
- The Board should provide documentation of the following for all future leases:
 - Needs analysis
 - Cost reasonableness
 - Full fair and open competition



Broker Services Corrective Action:

Board staff performed a competitive procurement for Real Estate Services.

- **Selected Vendor:** PCR Brokerage San Antonio, LLC DBA Partners
- **Contract Term:** March 13, 2023 - March 13, 2024
- **Available Renewals:** Four One-Year Renewal Options

Contract Controls Implemented:

- Contract Management Database has been developed that tracks:
 - Contract Expiration Dates
 - All Contract Actions
 - All Follow Up with end users for continuous collaboration, training, and development with program managers, contractors, and vendors.
- Upgraded Contract Manager to Assistant Director of Procurement, manages all contracts and the database.
- Bonfire (e-procurement system) sends automated reminders to end users.

Contract Automation

TO MAXIMIZE CONTRACT LIFECYCLE
MANAGEMENT



Automate
approvals and
signing



Standardize
contract
authoring



Improve
business
relationships



Leverage
electronic
signature
integrations



Boost
compliance
and decrease
risk

TWC FINANCIAL MONITORING

Lease Corrective Action: TWC has not requested the Board to break any leases, but the Board **MUST** ensure that they document a needs analysis, cost reasonableness, and full and open competition, prior to renewing or executing any lease.

TWC Recommendations:

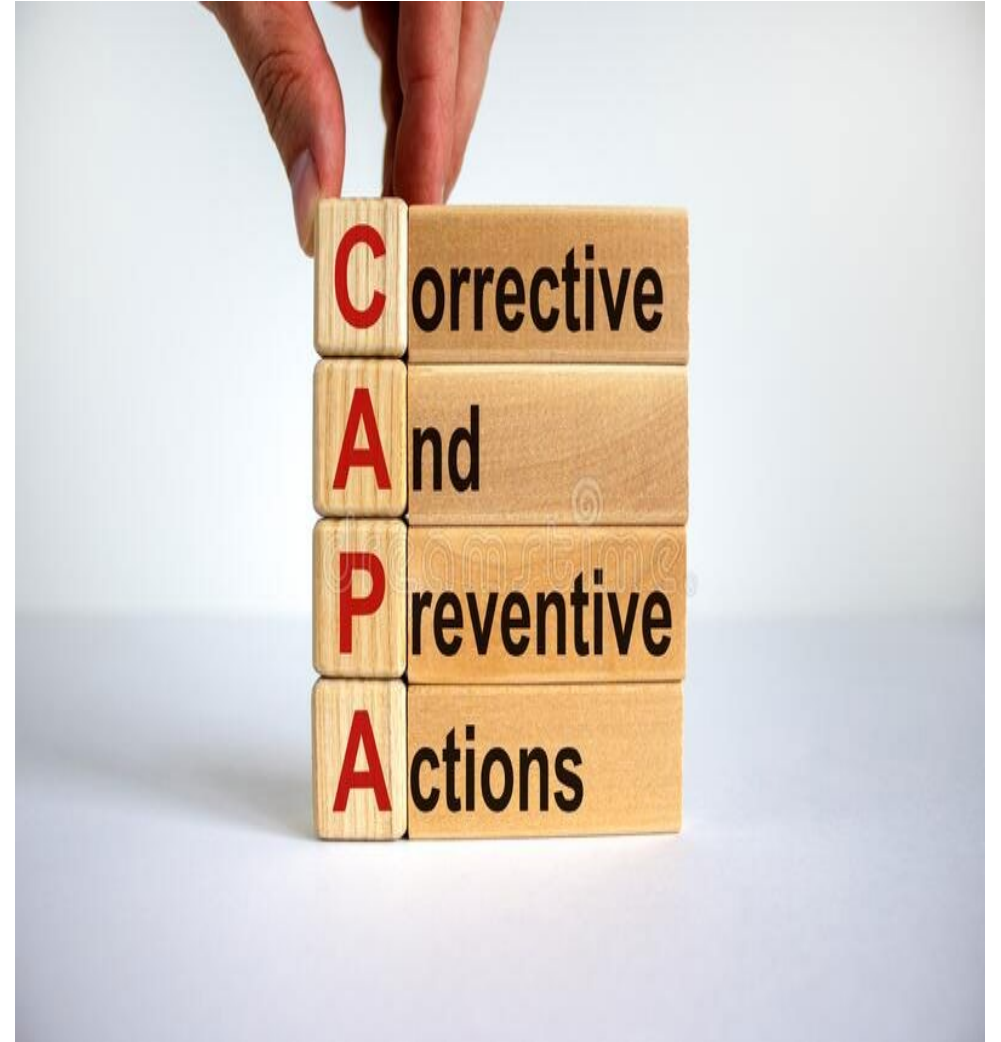
- Completing a 100% review of each lease with the required documentation to address the finding.
- The Board will perform a complete and transparent procurement for each lease **BEFORE** exercising any renewal options.
- Perform an after-the-fact market analysis before exercising any renewal options.
- Original lease procurements must include **ALL** renewal options.
- Additional renewal periods **NOT** in the original procurement may not be exercised.
- TWC acknowledges the differences in market rates between urban and rural locations; factors such as build-out, location, and available properties on the market must be considered.

TWC FINANCIAL MONITORING

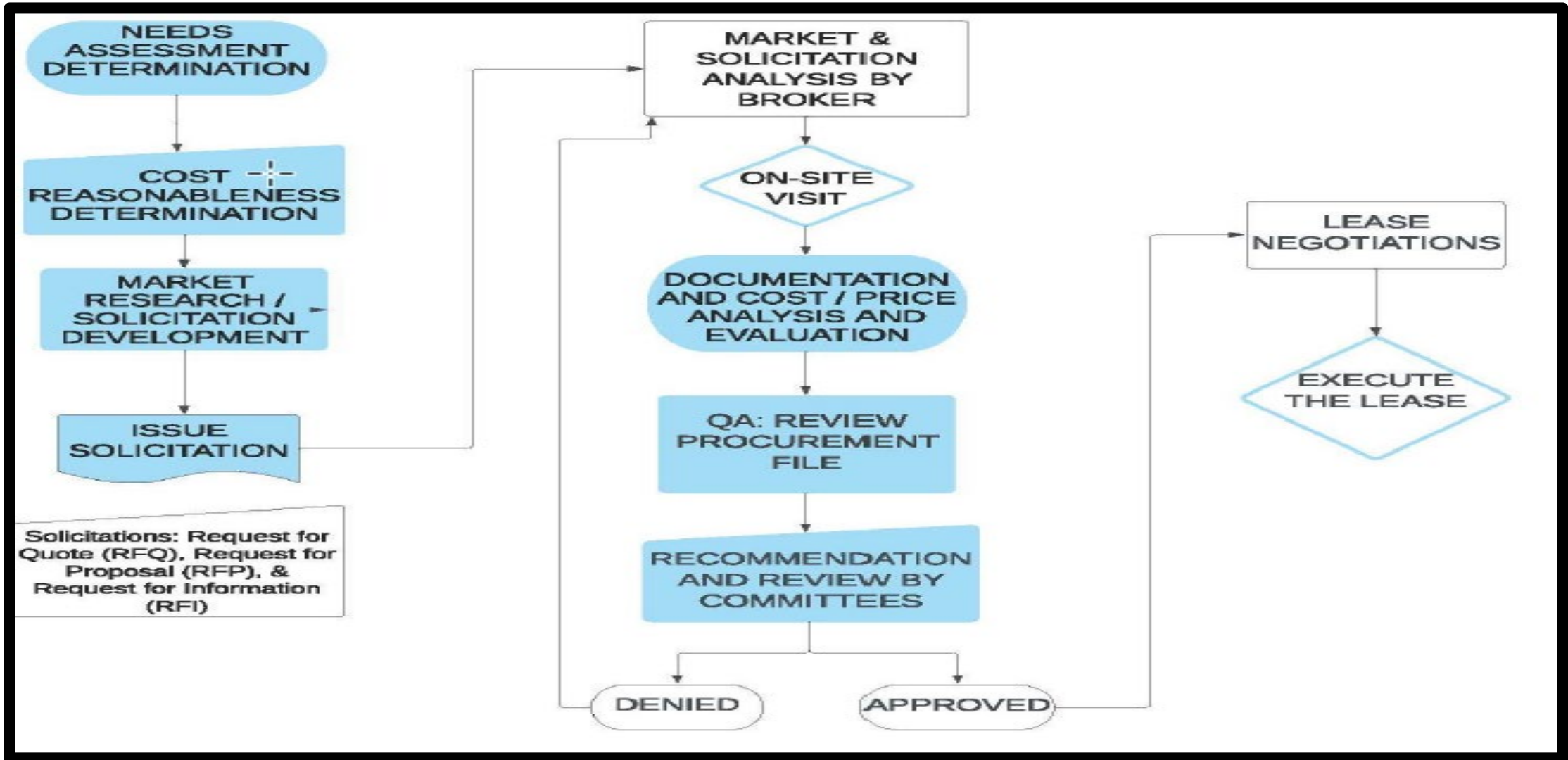
Lease Corrective Action: The Board staff has completed a preliminary lease analysis of all leases and determined full and open procurement documentation to comply with the FMGC.

Board staff has developed the following tools to ensure all recommendations are implemented, and adequate controls are in place for the proper and transparent lease procurement and future procurement and lease renewal options:

- Needs Determination Market Analysis
- Lease Procurement Checklist
- Procurement Lease Schedule of Activities
- Internal Quality Review **BEFORE** recommendation is presented to committees for approval
- Lease Addendum provisions to standard leases



LEASE PROCUREMENT FLOWCHART





- Veteran Owned/Minority Owned Small Business
- Texas HUB Certified



WSA Contract No. 2022VC011 Engagement Scope (Highlights) (April 2021 – May 2022)

- Comprehensive Assessment of the WSA Procurement Department
- Tasked to review current procurement process, recommend and assist in process improvements
- Support Audit reconciliation activities
- Assessment and Advising Federal/State/Local Government Procurement Practices and Enhance Best Practices
- Recommendations on Capacity Building and Strengthening Policy & Procurement System(s) Performance
- Standardize Procurement Practices and Processes Agencywide



Assessment Results (Overview)

- End User and current staff understanding of policies were not standardized leading to gaps in procedures and functional roles/responsibilities.
- Gaps in current policies and procedures leading to non-documented SOPs to comply with FMGC and Uniform Guidance
- Gaps in appropriate procurement documentation and standard best practices/procedures.
- Gaps in overall procurement operational practices and procedure effectiveness.

Accomplishments & Implementing Recommendation(s)

- Optimize ongoing monitoring compliance practices and continuous monitoring tools.
- Revised Procurement Policy Manual, developed Standard Operating procedures (SOPs) and document work-flow of procurement practices.
- Implementing and operationalize procurement checklists, standard operating procedures (SOPs) and other tool kits to standardize efficiency and effectiveness of procurement practices.
- Strengthening procurement capacity and improve documentation on all procurement lifecycle actions to include needs assessment, leases and cost/price/market analysis process.
- Advisement and Support on Audit reconciliation and responses.





Questions

MEMORANDUM

To: Oversight Committee
From: Dr. Ricardo Ramirez, Director of Quality Assurance
Presented by: Dr. Ricardo Ramirez, Director of Quality Assurance
Date: April 7, 2023
Subject: Briefing – Quality Assurance Update

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

TWC Monitoring

Annual Monitoring

TWC completed its Annual Monitoring of WSA on 10/21/2022. We received the Final Report and an Audit Resolution Letter (both included in the packet). *Next Steps:*

- Board staff has 45 calendar days (due 05/15/2023) from the 03/30/2023 Audit Resolution Letter date to submit the requested information. Items include:
 - Six Leases,
 - Broker’s Contract,
 - Non-Custodial Parent (NCP) Grant: one attribute, and
 - Program Monitoring Procurement (re-procured December 12, 2022).
- TWC’s Annual Monitoring Report (attached). The Audit Resolution Letter includes the items WSA needs to respond to from the report.

Other Monitoring Engagements

- Child Care Services (performed every 2-3 years): we have not received a report.
- SNAP E&T (performed by Health & Human Services Commission/HHSC via TWC): we have not received a report. HHSC did not report any issues during the Exit Conference.

External Program Monitoring (Ms. Christine Nguyen, CPA)

- COSA Child Care Services (CCS): completed with 100% accuracy rate.
- Ready-to-Work (RtW): Exit Conference scheduled the week of 04/03/2023.
- Upcoming: WIOA Adult and Dislocated Worker. QA will schedule the Entrance Conference based on progress to address TWC’s Monitoring.

Internal QA Program Monitoring

- SNAP E&T and Non-Custodial Parent (NCP) Technical Assistance (TA): to help address TWC’s monitoring.
- SNAP E&T Annual Review: ongoing.

- Trade Adjustment Assistance (TAA): completed a Phase I report.
 - The report highlights four (4) attributes for continuous quality improvement: Benchmark reviews, Program Detail Data Entry, Service Tracking Data Entry, and Performance Outcomes Data Entry. QA will implement Phase II monitoring in the coming months to validate improvements. The report does not include accuracy rates because of the low number of participants enrolled in the grant.
- National Dislocated Worker (NDW): was delayed to address TWC’s Monitoring. Exit Report’s responses due from C2GPS 03/31/2023.

Other Activities

- Digitizing Paper Records: led by Trema Cote from the QA team for the One-Stop grants (currently, only Child Care and Youth are digitized, so the project includes all other grants with a completion date of the end of August).
- WSA Policy Review: 95% finalized – expect to be fully completed within the next couple of weeks.
- Presentation for the Aspen Institute on “Income Inequality as an Outcome of the Labor Market.”
- Other: MIS (Local Plan, UI Weekly Job Search Requirements), Procurement (internal controls), TANF Initiative (program design).

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 funded the External Program Monitoring at \$170,054.

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:

- QA Estimated Timeline (FY22-23)
- TWC’s Annual Resolution Letter
- TWC’s Annual Monitoring Report



Estimated Timeline – External Program Monitoring Activities 2022-2023

Initial Estimated Timeline				Actual Time line						
<i>External Program Monitoring</i>	<i>Duration</i> ⁺⁺	<i>Start</i>	<i>Finish</i>	<i>Duration</i> ⁺⁺	<i>Effort</i>	<i>Variance</i>	<i>Start</i>	<i>Finish</i>	<i>% complete</i>	<i>Comments</i>
Estimated Timeline: 2022-2023	242	10/3/2022	9/5/2023	0	91	Duration	10/3/2022		26%	
*COSA - Child Care Services	92	10/3/2022	2/7/2023	92	91	0	10/3/2022	2/7/2023	100%	Started but was postponed 43 days until External Monitoring Consultant was procured.
CONSORTIUM - Ready to Work	57	2/3/2023	4/24/2023				2/10/2023		61%	Planning took additional time to prepare (e.g., this is a completely new grant, required access to Signify, tool preparation, etc.).
C2GPS - WIOA Adult & Dislocated Worker	70	2/28/2023	6/5/2023				3/23/2023		12%	Entrance Conference delayed to accommodate work with TWC's Monitoring.
C2GPS - TANF/Choices	58	6/1/2023	8/21/2023							
SERCO - WIOA Youth	47	7/3/2023	9/5/2023							

Avg Duration or Effort (days) →

65

92

91

0

Multi-tasking (% days overlapping projects) →

37.8%

100.0%

Duration : total days from start to finish to complete project (includes some holidays); **Effort (or Work)** : actual number of days spent on each project.

Modification Notes

⁺⁺ The Duration is not equal to the time that the contractors are actively involved in the project - it includes additional internal QA work (e.g., desk and policy review and tool development, etc.)

* COSA-Child Care Services was started but later postponed until the External Monitoring Consultant was procured



Estimated Timeline – Internal Program Monitoring Activities 2022-2023

Note: may expect delays due to increased efforts tied to TWC’s Monitoring report and Audit Letter.

Initial Estimated Timeline				Actual Timeline						
Internal Program Monitoring	Duration ⁺⁺	Start	Finish	Duration ⁺⁺	Effort	Variance	Start	Finish	Comments	% complete
Estimated Timeline: 2022-2023	215	11/14/2022	9/8/2023	Duration			10/11/2021	10/31/2022		45%
Trade Adjustment Assistance (TAA) - Phase I	49	11/14/2022	1/19/2023	75	55	26	11/14/2022	2/24/2023	Included delays for SNAP/NCP TAP for TWC's Monitoring, plus a 1-day extension for C2GPS.	100%
National Dislocated Worker (Phase II)	50	1/3/2023	3/13/2023				1/3/2023		Ongoing with delays for SNAP/NCP TAP for TWC's Monitoring.	69%
SNAP E&T										
Technical Assistance							11/1/2022		TAP for TWC's Monitoring. Ongoing.	
Annual Review	45	3/13/2023	5/12/2023				3/8/2023			
Non-Custodial Parent (NCP, Phase II)										
Technical Assistance							11/1/2022		TAP for TWC's Monitoring. Ongoing.	
Annual Review	45	4/20/2023	6/21/2023							
Child Care QIA	31	5/30/2023	7/11/2023							
RESEA	41	6/20/2023	8/15/2023							
Summer Earn & Learn (SEAL)	38	7/19/2023	9/8/2023							
Other (Phase II, TWC, Training, etc.)	50	8/24/2023	11/1/2023							
Avg Duration or Effort (days, excludes "Other") →	44			75	55	26				
Multi-tasking (% days overlapping projects) →	38.4%			100.0%						

Duration: total days from start to finish (includes some holidays); **Effort (or Work)**: actual number of days spent on each project.

Modification Notes

⁺⁺ The Duration is not equal to the time that the contractors are actively involved in the project - it includes additional internal QA work (e.g., desk and policy review and tool development,

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Aaron Demerson
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Alberto Treviño, III
Commissioner Representing
Labor

Edward Serna
Executive Director

March 30, 2023

Mr. Adrian Lopez, Chief Executive Officer
Workforce Solutions Alamo
100 North Santa Rosa St., Suite 120
San Antonio, Texas 78207

Dear Mr. Lopez:

This letter is regarding findings identified in the Texas Workforce Commission (TWC) Monitoring Report #23.20.0001. This report included a review of the Child Care Services, Choices (employment services for Temporary Assistance for Needy Families), Employment Services, Trade Adjustment Assistance, and Workforce Innovation and Opportunity Act programs administered by Workforce Solutions Alamo (Board). This monitoring review identified findings that require further resolution actions as outlined below:

Finding: Ensure Leases are Properly Procured

The Board did not comply with federal and state procurement requirements for six workforce center leases. The following errors were noted:

- For the Pearsall Workforce Center lease, the Board did not complete a market analysis prior to the option to renew on November 1, 2021, or a justification for staying at the current space. The Board provided a market analysis completed on October 5, 2022, which was late and did not contain sufficient information.
- For the Floresville Workforce Center lease, the Board has a new lease beginning August 1, 2021. The Board did not conduct a needs determination for the square footage.
- For the Kenedy Workforce Center lease, the Board exercised its option to renew. However, the lease renewal contained language for another option to renew for two years, that was not included in the procurement.
- For the New Braunfels Workforce Center lease, the Board did not provide a needs determination for the square footage needed. The Board also executed an amendment to an expired lease instead of entering into a new lease.

- For the Boerne Workforce Center lease, the Board did not provide a needs determination for the square footage needed.
- For the Hondo Workforce Center lease, the Board exercised an option to renew that was not included in the procurement.

In addition, the broker's contract expired December 31, 2021, and the broker continued to provide services.

By not adhering to procurement controls, the Board cannot demonstrate that all procurement actions were conducted in a manner providing for full and open competition.

Documentation Required:

The recommendation in the monitoring report states that the Board should strengthen controls over expiring contracts. The Board should adhere to the requirements of the FMGC and should reprocure the workforce center leases, in compliance with federal and state requirements. In addition, the board should reprocure the contract for a broker before requesting additional services.

Please provide implemented controls and procedures which address each of the weaknesses identified, and ensure effective controls are in place for the procurement of leases which ensures that all procurements are conducted in a manner that provides full and open competition at all times, in accordance with FMGC Supplement on Procurement, Version 1.0. In addition, please provide current procurement documentation for the broker selected.

- For the Pearsall Workforce Centers, please provide a most recent detailed market analysis of facilities comparable to the current location. Please include costs such as build out costs, renovation costs (if any), triple net (NNN) costs, moving costs, cost of rent, comparable square footage needed, and number of parking spaces available to ensure that the best value was obtained to meet the Board's current needs. In addition, please provide justification for selecting the current location.
- For the Floresville and Boerne Workforce Centers, please provide the needs assessment documentation which should include but not limited to square footage needed as well as usage information, location preference, number of parking spaces needed, etc. to ensure that the selected locations meet Board's current needs.
- For the Kenedy Workforce Centers, the original contract agreement effective February 1, 2019 – January 31, 2022, had a one-time extension option for an additional 36 months. The current lease agreement, effective February 1, 2022 – January 30, 2025, granted a second option to extend the term to

January 31, 2027. However, this option was not included in the original procurement. Therefore, the Board cannot exercise the second renewal option and must procure this workforce center by the end of January 31, 2025. In order to resolve this issue, please provide a revised current lease agreement that does not include the additional renewal option for two years and market analysis that was completed prior to January 31, 2022.

- For the New Braunfels Workforce Center, the original lease agreement effective July 11, 2000 – July 10, 2005, did not include a renewal option and the Board did not procure a new lease agreement. Since 2005 to 2022, the Board continued to amend the original lease agreement with current lease agreement ending January 31, 2032. In order to resolve this issue, the Board agreed to review its current lease agreement for termination options and will develop and provide a plan of action to ensure the Board’s needs are met while ensuring procurement guidelines and requirements are followed.
- For the Hondo Workforce Center, please provide a current market analysis of one or more facilities comparable to the current location. Please include costs such as build out costs, renovation costs (if any), triple net (NNN) costs, moving costs, and number of parking spaces available to ensure that the best value was obtained to meet the Board’s current needs. The original contract agreement effective January 1, 2016 – December 31, 2018, had an extension option for an additional 48-months to end December 31, 2022. However, the Board had chosen a 36-month option (January 1, 2019 – December 31, 2021). The current lease agreement, effective January 1, 2022 – December 31, 2024 granted a second option to extend the term to December 31, 2027. The Board cannot exercise the second renewal option and must procure this workforce center by the end of December 31, 2024. In order to resolve this issue, please provide a revised current lease agreement that does not include the additional renewal option for three years.

We’ve attached a sample of a Lease Market Assessment Information worksheet to assist the Board in performing its market analysis of the leases. Lastly, please provide a copy of recent procurement training documentation, including agenda and sign-in sheets, if conducted.

Finding: Ensure NCP Choices Guidelines are Followed

In nine of fourteen (64 percent) applicable case files tested, the request to remove was not sent within the required timeframe to the Office of the Attorney General (OAG). The requests were sent ranging from 16 to 87 days late. In addition, four were sent early, prior to participant being non-compliant for 30 days.

Without strict adherence to the NCP Choices requirements, the Board cannot ensure all the NCP program requirements are met, which may hinder the client from becoming economically self-sufficient and making consistent child support payments.

Documentation Required:

The recommendation in the monitoring report states that the Board should strengthen controls to ensure compliance with NCP requirements. Please provide implemented controls and procedures that address the weaknesses identified which ensures NCP Choices program requirements and guidelines are followed and adhered to, as indicated in [Non-Custodial Parent Choices: A Comprehensive Guide - February 2020, B-401: Request to Remove](#). In addition, please provide most recent Board monitoring of this area, along with training agenda and sign-in sheets, if conducted.

Finding: Ensure Monitoring Services are Procured

The Board did not ensure the Board's external program monitoring services were procured. The Board extended the contract for the Board's external program monitors which expired September 30, 2022, with no more options to renew. Instead of re-procuring, the Board completed a contract extension for 90-days, as of October 1, 2022, to increase the budget, and to test low-income childcare eligibility case files. By not re-procuring the monitoring services contract, full and open competition was limited. At the time of the monitoring review, the Board had not used any TWC funding to pay for the services during the 90-day extension.

By not adhering to federal and state procurement requirements, the Board cannot demonstrate that all procurement actions were conducted in a manner that is appropriate for the purchases of services.

Documentation Required:

The recommendation in the monitoring report states that the Board should strengthen controls to ensure that program monitoring services are procured and conducted in compliance with federal, state, and local requirements to allow for full and open competition. In addition, the Board should ensure that program monitoring services have been reprocured.

Please provide implemented controls and procedures which address each of the weaknesses identified, and ensure effective controls are in place for the procurement of external program monitoring services which ensures that all procurements are conducted in a manner that provides full and open competition at all times, in accordance with FMGC Supplement on Procurement, Version 1.0, E. Competition & Preferences, E.1 Full & Open Competition, E.1.2 Basic Standard, and that documentation is maintained. In addition, it is our understanding that the Board has already completed the procurement for program monitoring services. Please provide the procurement documentation including but not limited to RFPs, advertisement, Statement of Work, a detailed needs assessment, the proposals received from the bidders, evaluation tools and selection made, and copy of signed contract for the contractor selected. Lastly, a copy of recent procurement training documentation, including agenda and sign-in sheets, if conducted.

Mr. Lopez
Page 5
March 30, 2023

Please provide the above information within 45 calendar days from the date of this letter to Rudy Ortiz, via email rudolfo.ortiz@twc.texas.gov. Additional documentation may be requested at a future date based on the documentation submitted.

Thank you in advance for your cooperation and assistance. Should you have any questions or concerns, please contact Rudy Ortiz (512) 463-2943 or me at (512) 354-9616 or judy.ohn@twc.texas.gov.

Sincerely,

Judy Ohn

Judy Ohn
Director of Fiscal Services and Audit Resolution

Texas Workforce Commission

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Bryan Daniel, Chairman
Commissioner Representing
the Public

Aaron Demerson
Commissioner Representing
Employers

Alberto Treviño, III
Commissioner Representing
Labor

Edward Serna
Executive Director

Report #23.20.0001

ISSUE DATE: February 23, 2023

Mr. Adrian Lopez, Chief Executive Officer
Workforce Solutions Alamo
100 North Santa Rosa St., Suite 120
San Antonio, Texas 78207

Dear Mr. Lopez:

We have completed our review of the Supplemental Nutrition Assistance Program Employment and Training program administered by Workforce Solutions Alamo. Our review covered the period July 1, 2021, through July 31, 2022.

Our findings are summarized in the enclosed report. TWC Audit Resolution will contact you with an initial notification letter requesting the documentation necessary to resolve the outstanding findings identified in the report. The Board will have 45 calendar days from the issuance of the letter to respond to Audit Resolution with the documentation.

Thank you again for your cooperation and assistance. Should you have any further questions concerning the review, please contact me at (512) 936-3612.

Sincerely,



Mary B. Millan, Director of Field Operations
Subrecipient Monitoring
Division of Fraud Deterrence and Compliance Monitoring

Attachment



Supplemental Nutrition Assistance Program
Employment and Training
Monitoring Report
#23.20.0001
Workforce Solutions Alamo

Issued by Texas Workforce Commission
Subrecipient Monitoring Department

Board Background

Workforce Solutions Alamo is part of Texas Workforce Solutions – a statewide network of 28 Workforce Development Boards for regional planning and service delivery, their contracted service providers and community partners, and the TWC unemployment benefits Tele-Centers. This network, which includes the Texas Workforce Commission, gives customers local access to workforce solutions and statewide services through Workforce Solutions offices and Tele-Centers throughout the state.

The Board serves the following counties: Atascosa, Bandera, Bexar, Comal, Frio, Gillespie, Guadalupe, Karnes, Kendall, Kerr, McMullen, Medina, and Wilson.

C2 Global Professional Services is the subrecipient responsible for management of the Workforce Centers and SERCO provides youth services. The City of San Antonio provides child care services.

Executive Summary

The Texas Workforce Commission, Subrecipient Monitoring Department conducted a review of Workforce Solutions Alamo. This review identified opportunities to strengthen management controls and support compliance with contract requirements.

The Board is responsible for providing its Partners, Subrecipients, and Contractors with these findings and areas of concern and following up to ensure that any needed corrective actions are completed.

Finding: Ensure SNAP E&T Program Requirements are Followed

The Board did not ensure the service provider followed SNAP E&T program guidelines and required regulations were followed for work activities. The Board should strengthen its controls to ensure the form H1822 and form H1817 SNAP program requirements are followed.

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Finding

Ensure SNAP E&T Program Requirements are Followed

The Board did not ensure the service provider followed SNAP E&T program guidelines and required regulations were followed for work activities. The following details were noted:

- In four of 11 (36% percent) applicable case files tested, the form H1822 ABAWD Work Requirement Verification was not fully completed. Specifically, on all four files, the Part I box was not checked.
- In three of six (50 percent) applicable case files tested, the form H1817 SNAP Information Transmittal was not submitted to HHSC for a reconsideration request as soon as the client informed Workforce Solutions Office staff they obtained employment and one was not completed at all.
- In five of six (83% percent) applicable case files tested, when form H1817 SNAP Information Transmittal was sent to HHSC to request a reconsideration of eligibility, the requests were not entered in the TWIST Good Cause tab and Counselor Notes.

Accurate and complete documentation to verify SNAP E&T work activities is necessary to support participant compliance with required hours of participation. Without strict adherence to SNAP E&T directives, there is limited assurance that federal and state funds are expended in accordance with statutory requirements.

TWC, Supplemental Nutrition Assistance Program Employment and Training Guide, March 28, 2022, Part A – Policy and Requirements, A-203.a: Form H1822 Work Requirement Verification states:

“Boards must ensure that Workforce Solutions Office staff sends Form H1822 to HHSC within two weeks of an ABAWD’s initial participation in SNAP E&T activities. Initial participation starts at the orientation. Sending this form ensures that the ABAWD will not be in jeopardy of losing his or her SNAP benefits.

Boards must ensure that Workforce Solutions Office staff:

- completes Form H1822, Work Requirement Verification...

And *A-205: Requests for Reconsideration* states:

“Workforce Solutions Office staff does not conduct redeterminations of SNAP recipients who attend an employment planning meeting. However, if a SNAP recipient informs Workforce Solutions Office staff that he or she meets one of the federal exemptions, or if Workforce Solutions staff determines that a SNAP recipient is not suited for any E&T component, *Boards must ensure that Workforce Solutions Office staff:

- completes and sends HHSC Form H1817 to HHSC requesting that the SNAP recipient’s work registration status be reconsidered;
- records the reconsideration request into TWIST under the Good Cause tab;
- enters into TWIST Counselor Notes:
 - a statement that Form H1817 was sent to HHSC;
 - the date Form H1817 was sent to HHSC; and
 - the reason for the reconsideration;...
- keeps a copy of Form H1817 and fax confirmation on file at the Workforce Solutions Office.”

And *A-204.a(1): Federal Exemption Criteria and Corresponding Work Codes, Work Code P* states:

“Recipients are not required to participate further in SNAP E&T activities after they have accepted employment but can voluntarily participate until the job begins...Boards must ensure that a reconsideration request is sent to HHSC as soon as Workforce Solutions Office staff has been informed of the recipient’s full-time employment. See B-108.g for more information.”

And *Part B - Operations*, B-100: SNAP E&T Services, B-108.g: Unsubsidized Employment states:

“...If—*during* participation in SNAP E&T—a SNAP recipient enters full-time employment, Boards must ensure that Workforce Solutions Office staff:

- sends Form H1817 to HHSC to reconsider the recipient’s work registration status;
- enters into TWIST Counselor Notes:
 - a statement that Form H1817 was sent to HHSC;
 - the date Form H1817 was sent to HHSC; and
 - the reason for the reconsideration;
- keeps a copy of Form H1817 and fax confirmation on file at the Workforce Solutions Office; records the reconsideration in TWIST SNAP E&T Good Cause tab (see B-401.c); ...”.

Recommendation

The Board should strengthen its controls to ensure the form H1822 and form H1817 SNAP program requirements are followed.

Area of Concern**SNAP E&T Sanctions**

Although this was not a finding, we noted that penalties were not always issued within the required timeframe but as of November 2022, penalties are suspended.

Appendix A. Abbreviations and Terms

ABAWD	Able Bodies Adults Without Dependents
Board	Workforce Solutions Alamo
FMGC	Financial Manual for Grants and Contracts
HHSC	Health and Human Services
SNAP E&T	Supplemental Nutrition Assistance Program Employment and Training
TWC	Texas Workforce Commission
TWIST	The Workforce Information System of Texas

Appendix B. Review Objectives, Scope, and Methodology

Review Objectives

The purpose of our review was to provide reasonable assurance that Workforce Solutions Alamo uses TWC grant resources in accordance with state and federal requirements. We also sought to determine whether activities are conducted toward the goal of achieving program objectives while maintaining fiscal accountability.

Scope and Methodology

Monitoring reviewed the SNAP E&T program administered by the Board. We conducted this review from October 11, 2022, to October 21, 2022. Our goal was to provide reasonable but not absolute assurance regarding compliance with contract terms and objectives.

Toward this goal, we randomly selected and tested samples of transactions that occurred during the period of July 1, 2021, through July 31, 2022. Although no material issues came to the reviewers' attention other than those contained in this report, there is no assurance that other issues may not exist. Within the accounting and program books, records and documentation we tested control systems and transactions in the following areas:

Service Provider

SNAP E&T

Work Activities

Noncooperation

Fiscal

Allowable Costs and Pooled Expenditures

Disbursements

Cost Allocation

Appendix C. Report Distribution List

Copies of the report will be provided to the following parties:

Workforce Solutions Alamo

Leslie Cantu, Chair

United States Department of Health and Human Services

Gwendolyn Jones, Regional Program Manager

Deborah Daniels, Program Specialist

Alisa Matthews, Program Specialist

Texas Workforce Commission

Bryan Daniel, Chairman and Commissioner Representing the Public

Aaron Demerson, Commissioner Representing Employers

Alberto Treviño III, Commissioner Representing Labor

Edward Serna, Executive Director

Randy Townsend, Deputy Executive Director

Courtney Arbour, Director, Division of Workforce Development

Charles E. Ross, Jr., Director, Division of Fraud Deterrence and Compliance Monitoring

Chris Nelson, Chief Financial Officer

Adam Leonard, Director, Division of Information, Innovation and Insight

Appendix D. Exit Conference

Date: October 21, 2022

Attendees:

Adrian Lopez, Chief Executive Officer, Workforce Solutions Alamo
Chad Case, Procurement, Workforce Solutions Alamo
Linda Martinez, Executive Assistant, Board Liaison, Workforce Solutions Alamo
Ricardo G. Ramirez, Director, Quality Assurance, Workforce Solutions Alamo
Maria Martinez, Human Resources Generalist, Workforce Solutions Alamo
Marty Peña, Asset and Facilities Manager, Workforce Solutions Alamo
Trema Cole, Workforce Monitor II, Workforce Solutions Alamo
Terry Trevino, Director of Programs, Workforce Solutions Alamo
Giovanna Escalante-Vela, Controller, Workforce Solutions Alamo
Joshua Villela, Child Care Administrator, Workforce Solutions Alamo
Victoria Rodriguez, Workforce Specialist, Special Initiatives, Workforce Solutions Alamo
Rick Garcia, Program Manager, Workforce Solutions Alamo
Andrea Guajardo, Chief Information Officer, Workforce Solutions Alamo
Monica Godina, Management Information Systems, Workforce Solutions Alamo
Esmeralda Apolinar-Ramirez, Senior Accounting Manager, Workforce Solutions Alamo
Hugo Galaviz, Accountant II, Workforce Solutions Alamo
Rebecca Espino-Balencia, Director, Ready To Work, Workforce Solutions Alamo
Katherine Pipoly, Chief Operating Office, Workforce Solutions Alamo
Jeremy Taub, Director, Purchasing, Workforce Solutions Alamo
Matthew Aaron Bieniek, Information Technology, Workforce Solutions Alamo
Jessica Villarreal, Director, Child Care, Workforce Solutions Alamo
Brenda Garcia, Managing Director, C2 Global Professional Services
Sylvia Perez, Deputy Director of Operations, C2 Global Professional Services
Ramsey Olivarez, Chief Innovation Officer, C2 Global Professional Services
Michael DeFrees, Program Manager, Self-Sufficiency Programs, C2 Global Professional Services
Sandra A. Alvarez, Program Manager, C2 Global Professional Services
Belinda Gomez, Deputy Director, Fiscal Operations, C2 Global Professional Services
Aaron Smith, Chief Operating Officer, C2 Global Professional Services
Joseph Mansour, Compliance, C2 Global Professional Services
Blanca Luna, Deputy Director, Continuous Improvement, C2 Global Professional Services
Manuela Zarate, Vice President, Chief Operating Officer, SERCO
Andrea De La Garza, Director of Quality Initiatives, SERCO
Gabriela Horbach, Project Manager, SERCO
Roberto Corral, Operations Manager, Youth Program (Urban and Rural), SERCO
Susan Thomas, Senior Management Analyst, City of San Antonio Child Care Services
Cherri Smith, Management Analyst, City of San Antonio Child Care Services
Timothy L. Grant, Integrated Service Area Manager, Region 6, TWC
Ernesto Cantu, Project Manager, TWC
Nadine Butler, Monitor, TWC
Linda Banks, Monitor, TWC
Laura Mayorga, Monitor, TWC
Chiffon Mitchell, Monitor, TWC
Ashley Kendrick, Quality Assurance, TWC

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Labor

Edward Serna
Executive Director

Report #23.20.0001

ISSUE DATE: February 23, 2023

Mr. Adrian Lopez, Chief Executive Officer
Workforce Solutions Alamo
100 North Santa Rosa St., Suite 120
San Antonio, Texas 78207

Dear Mr. Lopez:

We have completed our review of the Child Care Services, Choices (employment services for Temporary Assistance for Needy Families), Employment Services, Trade Adjustment Assistance, and Workforce Innovation and Opportunity Act programs administered by Workforce Solutions Alamo. Our review covered the period July 1, 2021, through July 31, 2022.

Our findings are summarized in the enclosed report. TWC Audit Resolution will contact you with an initial notification letter requesting the documentation necessary to resolve the outstanding findings identified in the report. The Board will have 45 calendar days from the issuance of the letter to respond to Audit Resolution with the documentation.

Thank you again for your cooperation and assistance. Should you have any further questions concerning the review, please contact me at (512) 936-3612.

Sincerely,



Mary B. Millan, Director of Field Operations
Subrecipient Monitoring
Division of Fraud Deterrence and Compliance Monitoring

Attachment



Monitoring Report
#23.20.0001
Workforce Solutions Alamo

Issued by Texas Workforce Commission
Subrecipient Monitoring Department

Board Background

Workforce Solutions Alamo is part of Texas Workforce Solutions – a statewide network of 28 Workforce Development Boards for regional planning and service delivery, their contracted service providers and community partners, and the TWC unemployment benefits Tele-Centers. This network, which includes the Texas Workforce Commission, gives customers local access to workforce solutions and statewide services through Workforce Solutions offices and Tele-Centers throughout the state.

The Board serves the following counties: Atascosa, Bandera, Bexar, Comal, Frio, Gillespie, Guadalupe, Karnes, Kendall, Kerr, McMullen, Medina, and Wilson.

C2 Global Professional Services is the subrecipient responsible for management of the Workforce Centers and SERCO provides youth services. The City of San Antonio provides childcare services.

Executive Summary

The Texas Workforce Commission, Subrecipient Monitoring Department conducted a review of Workforce Solutions Name. This review identified opportunities to strengthen management controls and support compliance with contract requirements.

The Board is responsible for providing its Partners, Subrecipients, and Contractors with these findings and areas of concern and following up to ensure that any needed corrective actions are completed.

Finding #1: Ensure Leases are Properly Procured

The Board did not comply with federal and state procurement requirements for six workforce center leases. The Board should strengthen controls over expiring contracts. The Board should adhere to the requirements of the FMGC and should reprocure the workforce center leases, in compliance with federal and state requirements. In addition, the board should reprocure the contract for a broker before requesting additional services.

Finding #2: Ensure NCP Choices Guidelines are Followed

In nine of fourteen (64 percent) applicable case files tested, the request to remove was not sent within the required timeframe to the Office of the Attorney General (OAG). The requests were sent ranging from 16 to 87 days late. In addition, four were sent early, prior to participant being non-compliant for 30 days. The Board should strengthen controls to ensure compliance with NCP requirements.

Finding #3: Ensure Monitoring Services are Procured

The Board did not ensure the Board's external program monitoring services were procured. The Board extended the contract for the Board's external program monitors which expired September 30, 2022, with no more options to renew. Instead of re-procuring, the Board completed a contract extension for 90-days, as of October 1, 2022, to increase the budget, and to test low-income childcare eligibility case files. By not re-procuring the monitoring services contract, full and open competition was limited. At the time of the monitoring review, the Board had not used any TWC funding to pay for the services during the 90-day extension.

The Board should strengthen controls to ensure that program monitoring services are procured and conducted in compliance with federal, state, and local requirements to allow for full and open competition. In addition, the Board should ensure that program monitoring services have been reprocured.

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Findings

Ensure Leases are Properly Procured

The Board did not comply with federal and state procurement requirements for six workforce center leases. The following errors were noted:

- For the Pearsall Workforce Center lease, the Board did not complete a market analysis prior to the option to renew on November 1, 2021, or a justification for staying at the current space. The Board provided a market analysis completed on October 5, 2022, which was late and did not contain sufficient information.
- For the Floresville Workforce Center lease, the Board has a new lease beginning August 1, 2021. The Board did not conduct a needs determination for the square footage.
- For the Kenedy Workforce Center lease, the Board exercised its option to renew. However, the lease renewal contained language for another option to renew for two years, that was not included in the procurement.
- For the New Braunfels Workforce Center lease, the Board did not provide a needs determination for the square footage needed. The Board also executed an amendment to an expired lease instead of entering into a new lease.
- For the Boerne Workforce Center lease, the Board did not provide a needs determination for the square footage needed.
- For the Hondo Workforce Center lease, the Board exercised an option to renew that was not included in the procurement.

In addition, the broker's contract expired December 31, 2021, and the broker continued to provide services.

By not adhering to procurement controls, the Board cannot demonstrate that all procurement actions were conducted in a manner providing for full and open competition.

FMGC Supplement on Procurement, Version 1.0, E. Competition & Preferences, E.1 Full & Open Competition, E.1.2 Basic Standard states:

“Policy

All procurement transactions must be conducted in a manner providing full and open competition consistent with the standards in UG, UGMS and this Publication. Except where specified otherwise, selection of subgrantees (subrecipients) must also be conducted in a manner providing full and open competition.”

And continues in, *Q.3 Procurement Records*, states:

“Policy:

Grantees must maintain records sufficient to detail the history of procurement. Records will be retained and made available to authorized entities in accordance with applicable administrative requirements.

These records must include, but are not necessarily limited to the following:

- Rationale for the method of procurement
- Selection of contract type

- Contractor selection or rejection
- Basis for the contract price.”

And, *J.6 Lease of Real Property & Related Broker Selection, J.6.2.2 Broker Identification of Available Commercial Lease Properties** states:

“...As covered in Q.3 Procurement Records, in this Publication, the UG and UGMS require grantees to maintain records sufficient to detail the history of the procurement, including rationale for the procurement method. In keeping with this standard, the procurement records should include documentation of the initial market research and the grantee’s rationale to supplement or not supplement the broker’s/agent’s access to listing services with public advertisement of the grantee’s search for commercial property to lease.

An example of the steps a grantee might take when conducting a lease procurement with the full assistance of a real estate broker/agent includes the following:

- Define the business need—such as the general location (based on customer populations or other business needs of the grant award), access to public transportation, parking, size of the space needed, ground floor access (if applicable), ability of the property to meet the build out specifications (such as number of work spaces, common spaces, public bathrooms, etc.)
- Initial market research to determine whether to supplement the broker’s/agent’s use of listing services with public advertisement of the grantee’s property search, using the broker/agent or grantee as the point of contact
- Broker/agent identifies commercial properties that meet the grantee’s specifications
- Broker/agent and grantee identify which of the properties warrant site visits
- Broker/agent schedules site visits and attends the visits with the grantee
- Broker/agent further evaluate the visited properties against the grantee’s specifications
- Broker/agent requests a proposal from landlord/owner of the property or properties that best meet the grantee’s specifications
- Broker/agent reviews and explains the proposals to the grantee
- Grantee reviews the broker/agent recommendation and decides whether to execute a lease
- Broker/agent negotiates with the landlord/owner of the property that the grantee selected
- If agreed to by the broker/agent, the broker/agent assists the grantee with the oversight of any alterations or improvements required to make space ready for grantee occupation
- Grantee retains documentation of its original business need specifications, the broker/agent report on properties that met the specification, consideration of the properties and basis for the choice for site visits, observations made from the site visits, basis for further selection, including proposals received, broker/agent recommendation, grantee selection and basis, negotiation points, and the resulting lease.”

FMGC, Chapter 13, Property, Leases states:

“Costs for leased or rental property must conform to applicable cost principles for rental costs. Such property must be procured in accordance with applicable procurement requirements.”

FMGC, Chapter 8: Cost Principles states:

“A cost must meet the following general criteria in order to be allowable under a federal or state award:

...Be adequately documented. Documentation required may include, but is not limited to, travel records, time sheets, invoices, contracts, mileage records, billing records, telephone bills and other documentation that verifies the expenditure amount and appropriateness to the grant...”

Recommendation

The Board should strengthen controls over expiring contracts. The Board should adhere to the requirements of the FMGC and should reprocure the workforce center leases, in compliance with federal and state requirements. In addition, the board should reprocure the contract for a broker before requesting additional services.

Ensure NCP Choices Guidelines are Followed

In nine of fourteen (64 percent) applicable case files tested, the request to remove was not sent within the required timeframe to the Office of the Attorney General (OAG). The requests were sent ranging from 16 to 87 days late. In addition, four were sent early, prior to participant being non-compliant for 30 days.

Without strict adherence to the NCP Choices requirements, the Board cannot ensure all the NCP program requirements are met, which may hinder the client from becoming economically self-sufficient and making consistent child support payments.

Non-Custodial Parent Choices: A Comprehensive Guide - February 2020, B-401: Request to Remove states:

“Boards must ensure that a request to remove the NCP from the program is submitted within seven calendar days after the NCP is noncompliant for at least 30 days.

Boards must ensure that the following actions are completed during the 30-day noncompliance NCP Choices Program Guide 40 period:

- Notify OAG of the noncompliance immediately.
- Document OAG communication in TWIST and COLTS notes.
- Document weekly attempts to reengage the customer in TWIST and COLTS notes.

Boards must ensure that Workforce Solutions Office staff submits, by email or mail, a case closure request to the OAG contact using:

- the Request to Remove form (sample); or
- a locally developed form.

Boards must be aware that written Requests to Remove forms can also be provided to OAG during the monthly coordination meetings.

Boards must ensure that locally developed forms or request to remove communication include the following information:

- The Workforce Solutions Office staff member’s contact information (name, address, and phone number)
- NCP’s name
- OAG case number
- Reason for requesting the removal.”

Recommendation

The Board should strengthen controls to ensure compliance with NCP requirements.

Ensure Monitoring Services are Procured

The Board did not ensure the Board's external program monitoring services were procured. The Board extended the contract for the Board's external program monitors which expired September 30, 2022, with no more options to renew. Instead of re-procuring, the Board completed a contract extension for 90-days, as of October 1, 2022, to increase the budget, and to test low-income childcare eligibility case files. By not re-procuring the monitoring services contract, full and open competition was limited. At the time of the monitoring review, the Board had not used any TWC funding to pay for the services during the 90-day extension.

By not adhering to federal and state procurement requirements, the Board cannot demonstrate that all procurement actions were conducted in a manner that is appropriate for the purchases of services.

FMGC Supplement on Procurement, Version 1.0, E. Competition & Preferences, E.1 Full & Open Competition, E.1.2 Basic Standard states:

"Policy

All procurement transactions must be conducted in a manner providing full and open competition consistent with the standards in UG, UGMS and this Publication. Except where specified otherwise, selection of subgrantees (subrecipients) must also be conducted in a manner providing full and open competition."

In addition, *FMGC Supplement on Procurement, Version 1.0, E. Special Considerations for Certain Purchases, J.1 Consulting, Professional & Legal Services, J.1.2 Basic Standard* states:

"This Section, J.1.2 Basic Standard, provides additional compliance detail relating to the procurement of consulting, professional, and legal services.

Consulting services, professional services, and legal services must conform to applicable allowability requirements and any applicable limits and be procured in accordance with applicable administrative requirements."

Recommendation

The Board should strengthen controls to ensure that program monitoring services are procured and conducted in compliance with federal, state, and local requirements to allow for full and open competition. In addition, the Board should ensure that program monitoring services have been reprocured.

Appendix A. Abbreviations and Terms

Board	Workforce Solutions Alamo
CCS	Child Care Services
Choices	Employment services for TANF (Temporary Assistance for Needy Families)
COLTS	Choices Online Tracking System
ES	Employment Services
FMGC	Financial Manual for Grants and Contracts
IFA	Infrastructure Facilities Agreement
MOU	Memorandum of Understanding
NCP	Noncustodial Parent
NRP	Needs Related Payment
OAG	Office of the Attorney General
TAA	Trade Adjustment Assistance
TWC	Texas Workforce Commission
TWIST	The Workforce Information System of Texas
UG	Uniform Grant
UGMS	Uniform Grant Management Standards
WIOA	Workforce Innovation and Opportunity Act

Appendix B. Review Objectives, Scope, and Methodology

Review Objectives

The purpose of our review was to provide reasonable assurance that Workforce Solutions Alamo uses TWC grant resources in accordance with state and federal requirements. We also sought to determine whether activities are conducted toward the goal of achieving program objectives while maintaining fiscal accountability.

Scope and Methodology

Monitoring reviewed the CCS, Choices, ES, TAA, and WIOA programs administered by the Board. We conducted this review from October 11, 2022, to October 21, 2022. Our goal was to provide reasonable but not absolute assurance regarding compliance with contract terms and objectives.

Toward this goal, we randomly selected and tested samples of transactions that occurred during the period of July 1, 2021, through July 31, 2022. Although no material issues came to the reviewers' attention other than those contained in this report, there is no assurance that other issues may not exist. Within the accounting and program books, records and documentation we tested control systems and transactions in the following areas:

Board

- Monitoring and Oversight
 - Monitoring Certification
- Automation
 - Personally Identifiable Information
- Governance
 - Internal Controls
 - MOUs and IFAs

Child Care

- Recoupment

Service Provider

- Choices
 - Work Activities
 - Noncooperation
- NCP Choices
- WIOA

Fiscal

- Allowable Costs and Pooled Expenditures
 - Disbursements
 - Cost Allocation
 - Support Services & NRPs
- Procurement
 - Small and Micro-Purchases
 - Formal (including Fiscal Integrity)
- Fiscal Controls
 - Cash Management
 - Financial Reporting
- Property

Appendix C. Report Distribution List

Copies of the report will be provided to the following parties:

Workforce Solutions Alamo

Leslie Cantu, Chair

United States Department of Health and Human Services

Gwendolyn Jones, Regional Program Manager

Deborah Daniels, Program Specialist

Alisa Matthews, Program Specialist

United States Department of Labor

Nicholas E. Lalpous, Regional Administrator, Employment and Training Administration

M. Frank Stluka, Regional Director, Office of State Systems, Employment and Training Administration

Texas Workforce Commission

Bryan Daniel, Chairman and Commissioner Representing the Public

Aaron Demerson, Commissioner Representing Employers

Alberto Treviño, III, Commissioner Representing Labor

Edward Serna, Executive Director

Randy Townsend, Deputy Executive Director

Courtney Arbour, Director, Division of Workforce Development

Reagan Miller, Director, Division of Child Care and Early Learning

Charles E. Ross, Jr., Director, Division of Fraud Deterrence and Compliance Monitoring

Chris Nelson, Chief Financial Officer

Adam Leonard, Director, Division of Information, Innovation and Insight

Appendix D. Exit Conference

Date: October 21, 2022

Attendees:

Adrian Lopez, Chief Executive Officer, Workforce Solutions Alamo
Chad Case, Procurement, Workforce Solutions Alamo
Linda Martinez, Executive Assistant, Board Liaison, Workforce Solutions Alamo
Ricardo G. Ramirez, Director, Quality Assurance, Workforce Solutions Alamo
Maria Martinez, Human Resources Generalist, Workforce Solutions Alamo
Marty Peña, Asset and Facilities Manager, Workforce Solutions Alamo
Trema Cole, Workforce Monitor II, Workforce Solutions Alamo
Terry Trevino, Director of Programs, Workforce Solutions Alamo
Giovanna Escalante-Vela, Controller, Workforce Solutions Alamo
Joshua Villela, Child Care Administrator, Workforce Solutions Alamo
Victoria Rodriguez, Workforce Specialist, Special Initiatives, Workforce Solutions Alamo
Rick Garcia, Program Manager, Workforce Solutions Alamo
Andrea Guajardo, Chief Information Officer, Workforce Solutions Alamo
Monica Godina, Management Information Systems, Workforce Solutions Alamo
Esmeralda Apolinar-Ramirez, Senior Accounting Manager, Workforce Solutions Alamo
Hugo Galaviz, Accountant II, Workforce Solutions Alamo
Rebecca Espino-Balencia, Director, Ready To Work, Workforce Solutions Alamo
Katherine Pipoly, Chief Operating Office, Workforce Solutions Alamo
Jeremy Taub, Director, Purchasing, Workforce Solutions Alamo
Matthew Aaron Bieniek, Information Technology, Workforce Solutions Alamo
Jessica Villarreal, Director, Child Care, Workforce Solutions Alamo
Brenda Garcia, Managing Director, C2 Global Professional Services
Sylvia Perez, Deputy Director of Operations, C2 Global Professional Services
Ramsey Olivarez, Chief Innovation Officer, C2 Global Professional Services
Michael DeFrees, Program Manager, Self-Sufficiency Programs, C2 Global Professional Services
Sandra A. Alvarez, Program Manager, C2 Global Professional Services
Belinda Gomez, Deputy Director, Fiscal Operations, C2 Global Professional Services
Aaron Smith, Chief Operating Officer, C2 Global Professional Services
Joseph Mansour, Compliance, C2 Global Professional Services
Blanca Luna, Deputy Director, Continuous Improvement, C2 Global Professional Services
Manuela Zarate, Vice President, Chief Operating Officer, SERCO
Andrea De La Garza, Director of Quality Initiatives, SERCO
Gabriela Horbach, Project Manager, SERCO
Roberto Corral, Operations Manager, Youth Program (Urban and Rural), SERCO
Susan Thomas, Senior Management Analyst, City of San Antonio Child Care Services
Cherri Smith, Management Analyst, City of San Antonio Child Care Services
Timothy L. Grant, Integrated Service Area Manager, Region 6, TWC
Ernesto Cantu, Project Manager, TWC
Nadine Butler, Monitor, TWC
Linda Banks, Monitor, TWC
Laura Mayorga, Monitor, TWC
Chiffon Mitchell, Monitor, TWC
Ashley Kendrick, Quality Assurance, TWC

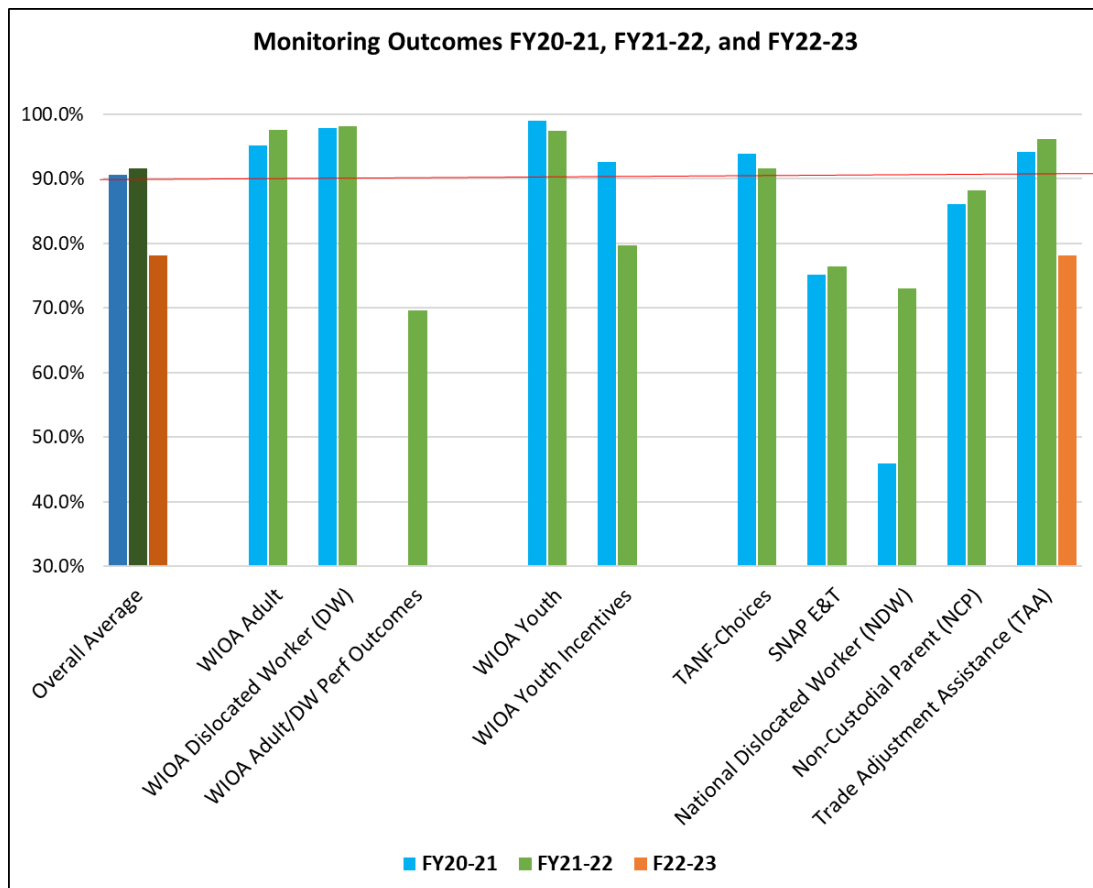
MEMORANDUM

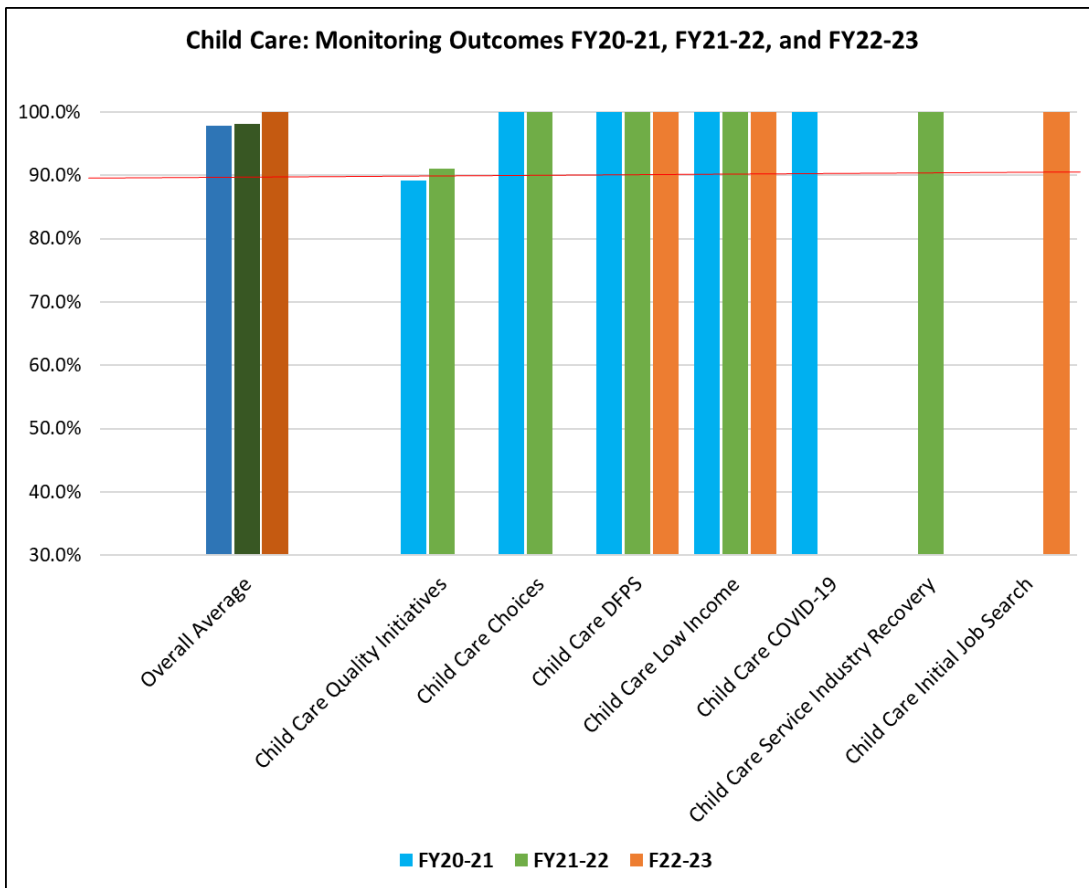
To: Oversight Committee
 From: Dr. Ricardo Ramirez, Director of Quality Assurance
 Presented by: Dr. Ricardo Ramirez, Director of Quality Assurance
 Date: April 7, 2023
 Subject: Briefing – Monitoring Outcomes & Technical Assistance

SUMMARY: This Memorandum presents a summarized version of monitoring outcomes previously presented to the Board. 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.





Technical Assistance

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.

Technical Assistance: Additional Monitoring

Expanded monitoring includes 100% monthly review by subrecipient with WSA QA validation of their monitoring and WSA QA testing of at least 20 cases per month.

Non-Custodial Parent (NCP)

- WSA Programs/Operations team implemented a TA Plan to address TWC’s Audit Resolution Letter and Annual Monitoring Report.

SNAP E&T

- WSA Programs/Operations team implemented a TA Plan to address TWC's Annual Monitoring Report.

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: Dr. Ricardo Ramirez, Director of Quality Assurance
 Presented by: Dr. Ricardo Ramirez, Director of Quality Assurance
 Date: April 7, 2023
 Subject: TWC Performance – Measurable Skills Gains (MSGs) and Credential Rates

SUMMARY: This Memorandum aims to present information to assist with the definition and role of these performance measures. WIOA §116 requires TWC to formally contract specific ‘siloes’ Title I Adult, Dislocated Worker (DW), and Youth measures to Boards. Two measures include the Measurable Skills Gains (MSGs) and Credential Rates. The following provides a summary of these two measures.

Board staff includes TWC-contracted performance in our contracts with partners (for the One-Stop/Adults and Youth service provider contracts). Staff uses TWC’s Management Performance Report (MPR) to determine performance outcomes to pay service provider profits (e.g., as negotiated at the beginning of each year). The “End-of-Year” (EOY) resembles the overall score or grade of the report card.

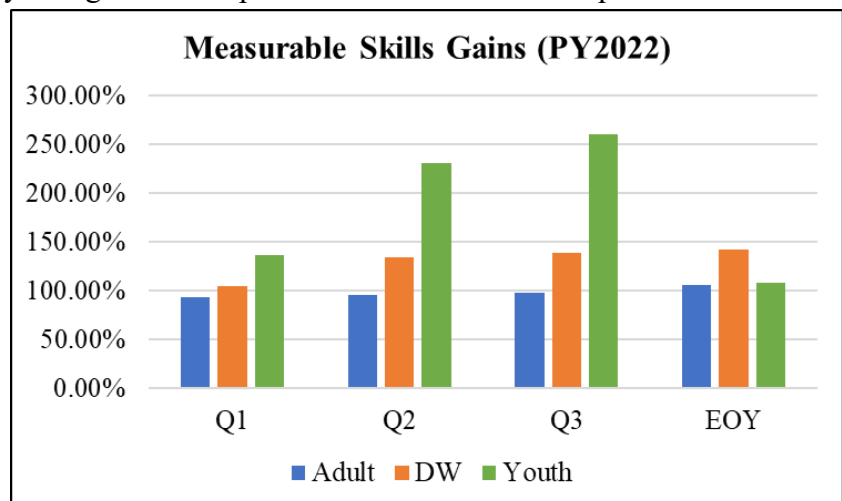
Measurable Skills Gains (MSGs)

The MSGs performance aim to capture the percent of Program Participants who (during the Program Year) were enrolled in an Education or Training program that leads to a recognized postsecondary credential or employment and who are achieving documented academic, technical, occupational, or other forms of progress towards such a credential or employment.

These can be understood as ‘industry-recognized occupational credentials.’ Examples of MSGs: Satisfactory Progress (for college/university and high school), Training Milestones, and Skills Progression.

For this past year, outcomes capture participants who gained industry-recognized occupational skills from July 1, 2021, through June 31, 2022.

Source: TWC MPR; Meeting >= 90%, Exceeding >=110%

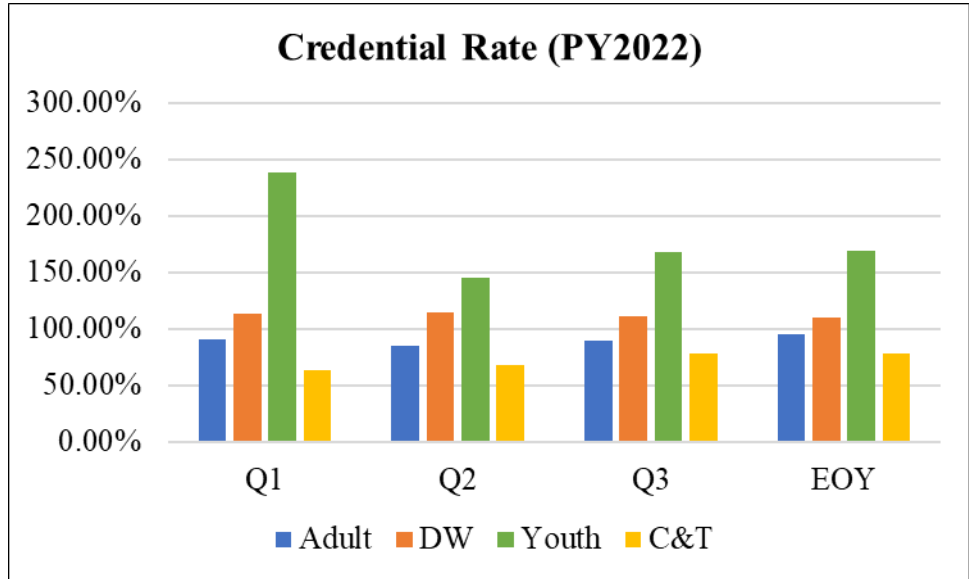


Credential Rate

The Credential Rate performance captures the percent of Exiting Program Participants (Exiters) who were in Training/Education other than On-the-Job Training or Employer Customized Training and who achieved a Recognized Credential within one (1) Year of Exit.

For this past year, outcomes capture participants who gain credentials from January through December (of the previous year).

Source: TWC MPR;
Meeting >= 90%,
Exceeding >=110%
C&T = Not Meeting.



Examples of Credentials: High School Equivalency/Diploma, Bachelors Degree, Master’s degree, Doctorate degree, Registered Apprenticeship, Associate Degree, Occupational Skills License, Occupational Certificate/Certification.

STAFF RECOMMENDATIONS:

TWC requires Boards to Meet or Exceed TWC-contracted performance measures as contracted to service providers. 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 sanction may carry additional requirements.

STRATEGIC OBJECTIVE: To help meet the requirements of of WIOA 116 which requires states to formally contract specific ‘siloes’ Title I Adult, Dislocated Worker (DW), and Youth Measures, including Measurable Skills Gain and Credential Rate.

ATTACHMENTS

- TWC Definitions: BCY22 LWDA Contracted Performance Measure Definitions for Credential Rate and Measurable Skills Gains.
- Measurable Skills Gains WSA Policy

TWC DEFINITIONS
BCY22 LWDA Contracted Performance Measure Definitions

Measure Name:	Credential Rate
Contracted?	Four (4) Measures: Title I Adult, Title I Dislocated Worker, Title I Youth, & All Career & Training Participants
Perf Period:	Exiters from 1/1/20 to 12/31/20
Data Source	TWC's PIRL Report
Definition:	The percent of Exiting Program Participants (Exiters) who were in Training/Education other than OJT or Employer Customized Training and who achieved a Recognized Credential within one (1) Year of Exit
Methodology	<p>Denominator is the number of Program Participants who Exited during the Performance Period who didn't have a valid Exclusion and who during their Period of Participation were either:</p> <ol style="list-style-type: none"> 1) Enrolled in training other than On-the-Job Training or Employer Customized Training (as defined by DOL, not the ECT code in TWIST); or 2) An In-School Youth. <p>Numerator is the number of Exiters from the Denominator who within one year (365 Days) of Exit have achieved either a:</p> <ol style="list-style-type: none"> 1) Recognized Credential other than a Secondary School Diploma/Equivalent; OR 2) Secondary School Diploma/Equivalent AND were also either: <ol style="list-style-type: none"> a. Employed in any of the four (4) Calendar Quarters Following the Calendar Quarter of Exit OR b. Enrolled in Post-Secondary Education or Training at some point during the first year (365 Days) following Exit. <p>Performance is calculated by dividing the numerator by the denominator.</p>
Additional Notes	<p>Year End Performance will be reported in the August MPR.</p> <p>Adult, Dislocated Worker, and Youth versions of these measures are required to be contracted to local Boards under WIOA §116. All Career & Training Participants was selected to be contracted because the state provides support for training and education through a variety of other programs.</p>

Measure Name:	Measurable Skills Gain
Contracted?	Three (3) Measures: Title I Adult, Dislocated Worker, Youth
Perf Period:	Participants in Education or Training (including OJT) from 7/1/21 to 6/30/22
Data Source	TWC’s PIRL Report
Definition:	The percent of Program Participants who (during the Program Year) were enrolled in an Education or Training program that leads to a recognized postsecondary credential or employment and who are achieving documented academic, technical, occupational, or other forms of progress towards such a credential or employment.
Methodology	<p>Denominator is the number of Program Participants who were enrolled in Education or Training (including OJT but not including Youth Work Experience) that leads to a recognized postsecondary credential or employment (including enrollment in Secondary Education) during the program year (7/1/21 to 6/30/22). <u>Note that this includes all In-School Youth.</u></p> <p>Numerator is the number of Participants from the Denominator who have a Measurable Skills Gain during the Program Year (even if after Exit but within the PY).</p> <p>Performance is calculated by dividing the numerator by the denominator.</p> <p>There are 5 types of Measurable Skills Gains:</p> <ol style="list-style-type: none"> 1) Achievement of an EFL for a person in education below Post-Secondary Level (note that enrolling in PSE AFTER Exit but DURING the same PY is evidence of an EFL); 2) Attainment of Secondary School Diploma/Equivalent; 3) Report Cards demonstrating progress: <ol style="list-style-type: none"> A) Secondary School report card showing sufficient hours to meet the state’s academic standards; B) PSE report card or transcript showing successful completion of at least 12 credit hours in a 12-month period that ends during the PY; 4) Satisfactory or better progress towards established milestones such as completion of OJT or advancement in an apprenticeship program; or 5) Successful passage of an exam that is required for a particular occupation or progress attaining technical or occupation skills based on trade-related benchmarks such as knowledge-based exams.
Additional Notes	<p>Year End Performance will be reported in the August MPR.</p> <p>Note that while Boards and States are required to report all gains a Participant achieves (even if multiple within the same category), the actual measure is %</p>

	<p>of Participants in Education/Training with a Gain. It is NOT Total Number of Gains achieved divided by Total Number of Participants in Education/Training. Thus, if a Participant achieves two (2) gains during the PY, the Participant only counts one time in the numerator.</p> <p>Adult, Dislocated Worker, and Youth versions of these measures are required to be contracted to local Boards under WIOA §116. All Career & Training Participants was selected to be contracted because the state provides support for training and education through a variety of other programs.</p>
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Measurable Skills Gains – WSA Policy

OUTCOME TYPE	Satisfactory Progress (Report Card or Transcript)	
	34 - College/University Transcript/Report Card	35 - High School Transcript/Report Card
WD 09-19,C1, Attachment 1	Postsecondary Education - at least 12 credit hours: a) full-time: in one semester during program year, or b) part-time: within same 12-month period that ends in the program year	Youth Only - Secondary (9-12 grades) - report card or transcript for one semester with academic standard achievement.
TWC Q&A	<p>For Proprietary Schools: terms such as ‘trimesters,’ ‘modules,’ ‘session,’ ‘term,’ or ‘quarter’ are used in lieu of ‘semester.’ For these, ‘contact’ or ‘clock’ hours must be used.</p> <p>With 6 credit hours in the 1st semester and 6 more in the next semester, if the semesters cross two PYs, the 6 credit hours in the 1st semester would not count in the 1st PY but both 6 credit hours would count in the 2nd PY.</p> <p>Includes Dual Credit coursework.</p> <p>Includes online training (e.g., through MedCerts) with verification of progression as required.</p>	All ISY are included in the denominator.

OUTCOME TYPE	Satisfactory Progress (Report Card or Transcript)	
	34 - College/University Transcript/Report Card	35 - High School Transcript/Report Card
TEGL 10-16, Ch. 1	If a postsecondary student completed 6 hours in the spring and 6 hours in the fall and the semesters cross two program years, they would not count as a skill gain in the first program year but would count in the second program year.	
	Programs should not delay enrollment or services to participants until a new program year even if programs believe there is insufficient time for the participant to make any type of measurable skill gain by the end of that program year.	
TWC MSG PowerPoint WD 09-19 Ch1 TEGL 10-16, Ch.1 TWC Email Clarification (07/20/2022)	Staff should enter each individual semester transcripts even if under 12 hours, by the end of the PY customer may accumulate the total 12 hours.	For Youth only, HSE Preparatory Course - report card or transcript at end of course with standard achievement.
Date	The date recorded must be the last day of the semester for which the report card demonstrates MSG requirements are met.	

OUTCOME TYPE	Established Training Milestone (Satisfactory or Better Progress Report)	
	36 - Training Milestone	
WD 09-19,C1, Attachment 1	<p>Achievement of <u>established milestones</u> of employer/training provider: a) completion of OJT, b) completion of one year of apprenticeship, c) similar milestones. Training reports of milestones completed as participant masters required job skills for these examples.</p> <p>May be documented with a satisfactory or better progress of an <i>established milestone</i>. The progress reflects achievement or mastering of a required job skill.</p> <p><i>Pay increase from working <u>additional hours</u> is not acceptable.</i></p>	

OUTCOME TYPE	Established Training Milestone (Satisfactory or Better Progress Report)
	36 - Training Milestone
TWC Q&A	<p>Counselor Notes should document the start and estimated end date of training, name of training, courses being taken, the MSGs participant should earn, and when established milestones are expected to be earned.</p> <p>Documentation for OJT includes OJT Contract and/or an evaluation from the employer - the process should be outlined in the OJT Contract prior to the beginning of the OJT.</p> <p>A “Certificate of ‘Training’ Completion” can be used to verify completion of training courses (as defined by <u>TEN 25-19 Att. 1</u>). Professional or industry associations may award occupational certificates (“certificate” and “certification” are often confused). “Certificates” are completion-based and denote participation in a defined course of study.</p> <p><i>Some certificates relate to discrete skills within one or more industries or occupations (e.g., writing, leadership, general hygiene, handwashing, general safety, cardiopulmonary resuscitation or CPR, work readiness, food-handling certificates, etc.) - these are typically not eligible.</i></p> <p><i>Passing a test in an academic course by participants enrolled in a traditional secondary or postsecondary education program is not considered an MSG gain. Quizzes and single exams (i.e. Science quiz, weekly, mid-term or final exam would not be eligible.</i></p>
TEGL 10-16, Ch. 1	<p>Programs should identify appropriate methodologies based on the nature of the services, and must document <i>substantive</i> skill development.</p> <p>May include training reports or milestones completed as the individual <i>masters the required job skills</i>, or steps to complete an OJT or apprenticeship.</p> <p>Includes increases in pay resulting from newly acquired skills or increased performance.</p> <p>May include: documentation demonstrating participants master required job skills through training.</p> <p>‘Completion of one year of an apprenticeship’ is just one example and reflects a ‘timeframe’ that may be established as a milestone - a ‘one year’ timeframe should not be construed as a required timeframe or the only way an apprentice can achieve an MSG.</p>

OUTCOME TYPE	Established Training Milestone (Satisfactory or Better Progress Report)
	36 - Training Milestone
<p>TEN 25-19 Attachment 1</p>	<p>A postsecondary credential that validates attainment of a measurable technical or industry/occupational skill necessary to a) gain employment or b) advance within an industry/occupation. These ‘skills’ are based on standards developed or endorsed by businesses or industry associations.</p> <p>Certificates, reports, or credentials of this type pertain to a skill that must be recognized industry-wide, or document a measurable technical or industry/occupational skill, <i>necessary</i> to gain employment or advance in a specific occupation.</p> <p><i>Certificates awarded by Boards are not included in this definition, nor are work readiness certificates.</i></p> <p>Examples (there is no comprehensive national list of approved credentials):</p> <ul style="list-style-type: none"> -A document from a nationally- or regionally-recognized industry association -A document from an organization representing a sizeable portion of the industry sector -A credential that is sought or accepted by companies within the industry sector for purposes of hiring or recruitment -Stackable industry-recognized credentials (e.g., Advanced Manufacturing, Healthcare/Electronic Health Records)
<p>TWC MSG PowerPoint WD 09-19 Ch1 TEGL 10-16, Ch.1 TWC Email Clarification (07/20/2022)</p>	<p>Examples:</p> <ul style="list-style-type: none"> -Must document substantive skill development. -Training Provider Certificate of Training Completion (of training courses). -Successful completion of Nurse Aid Provider Training Classes (before State Exam). -Successful completion of OJT (documented in OJT Training Plan and Agreement). -Completion of 1st year of Apprenticeship Program (in signed DOL Apprentice Agreement). -Increase in pay from newly acquired skills/or performance. -Food Handlers, CPR and First Aide Certificates if received as a component of a larger training program. -A progress report that lists a number of benchmarks by identifying the occupational and industry-recognized skills that the customer is learning. If a progress report does not contain enough information about the achieved milestone, the progress report in conjunction with case notes can be used to document the achievement of an MSG milestone. The case notes must detail and identify the specific training milestone, how the MSG was earned and documented. <p><i>-OSHA-10 is not considered eligible for MSG.</i></p> <p><i>-“Yes/No” or similar statements in a report to record a gain are insufficient.</i></p>

OUTCOME TYPE	Established Training Milestone (Satisfactory or Better Progress Report)
	36 - Training Milestone
Date	Date recorded must be the date the employer/training provider indicated the milestone was met.

OUTCOME TYPE	Skills Progression (Passage of an Exam)
	37 - Skills Progression
WD 09-19,C1, Attachment 1	<p>Passage of an exam that is required: for an occupation and to progress in attaining technical or occupational skills as evidenced by trade-related benchmarks (e.g., knowledge-based exams).</p> <p>May include: a) passing a component exam in a registered apprenticeship program; b) an employer-required knowledge-based exam; c) satisfactory attainment of an element of an industry or occupational competency-based assessment; d) other completion test necessary to obtain a credential.</p> <p><i>Passing a test in an academic course by participants enrolled in a traditional secondary or postsecondary education program is not considered a gain.</i></p>
TWC Q&A	<p>Allowable examples include passage of LVN or RN NCLEX exams even without completing the minimum 12 credit hours in one semester (full-time) or within two semesters (part-time).</p> <p>Attainment of industry-recognized credential.</p> <p>“Certifications” attest to attainment of competence through a rigorous examination or demonstration and may include a work experience requirement - they are also usually considered to be more rigorous and indicate a higher level of competence or proficiency than a Certificate.</p> <p><i>Passing a test in an academic course by participants enrolled in a traditional secondary or postsecondary education program is not considered an MSG gain. Quizzes and single exams (i.e. Science quiz, weekly, mid-term or final exam would not be eligible.</i></p> <p><i>A CDL driving permit for a temporary period is not an MSG.</i></p>

OUTCOME TYPE	Skills Progression (Passage of an Exam)
	37 - Skills Progression
TWC MSG PowerPoint WD 09-19 Ch1 TEGL 10-16, Ch.1 TWC Email Clarification (07/20/2022)	Examples: -Passing Texas Department of Public Safety, CDL written and driving test. -Passing State Certified Nurse Aid written and hands-on Exam -Passing Specific Welding Type Exam (Arc, Pipe, etc.) -Electrician Apprenticeship – passing exam on wiring a Ceiling Fan -Information Technology – passing exam for Industry-Recognized Credential (Microsoft, CompTIA, Windows Certified Technologist, Network +, PMP) -HVAC – EPA Certification, Universal Type I, II III, or IV -Medical Certification – passing exam by an Accredited Medical Certification Exam (CMA, Pharmacy Technician, Phlebotomy Technician, Medical Records Technician, Medical Billing & Coding).
Date	Date recorded must be the day the exam was completed and passed.



WSA Quality Assurance

Dr. Ricardo Ramirez, Director of Quality Assurance

April 7, 2023





Summary

Quality Assurance (QA) monitoring activities:

- *Briefing on Monitoring Activities*
- *Briefing on Monitoring Outcomes & Technical Assistance (TA)*
- *TWC Performance: Measurable Skills Gains (MSGs) and Credential Rates*

Staff is not requesting Board action at this time.

Briefing on Monitoring Activities



Texas Workforce Commission (TWC) Monitoring

TWC Annual Monitoring

TWC completed its Annual Monitoring of WSA. We received the Final Reports (attached) and an Audit Resolution Letter. *Next Steps:*

- TWC Audit Resolution: WSA will have 45-days to submit resolution of the items (due 05/15/2023), including:
 - Six Leases, Broker's Contract, Non-Custodial Parent (NCP) grant (one attribute), and Program Monitoring Procurement.

Current Monitoring Engagements

- Child Care Services (performed every 2-3 years): TWC completed but we have not received a report.
- SNAP E&T (performed by Health & Human Services Commission via TWC): clean report. Will be included during the Executive Committee.

Briefing on Monitoring Activities



External Program Monitoring

- COSA Child Care Services (CCS): completed with 100% accuracy rate!
 - Congratulations to COSA for attaining 100% accuracy during the past several years – such an outstanding achievement for such a large grant.
- Ready-to-Work (RtW): Exit Conference scheduled the week of 04/03/2023.
- Upcoming:
 - WIOA Adult and Dislocated Worker: Entrance to be scheduled based on progress with TWC's Monitoring.

Briefing on Monitoring Activities



Internal Program Monitoring

Current Internal Monitoring Engagements

- SNAP and Non-Custodial Parent (NCP) Technical Assistance: performed as part of resolution of TWC's monitoring.
- SNAP Annual Review: ongoing.
- Trade Adjustment Assistance (TAA): completed Phase I report: included four (4) attributes for continuous quality improvement:
 - Benchmark reviews, Program Detail Data Entry, Service Tracking Data Entry, and Performance Outcomes Data Entry. QA will implement a Phase II monitoring in the coming months to validate improvements.
- National Dislocated Worker (NDW): has experienced a few delays to address TWC's monitoring. Received C2GPS responses to Exit Report on 03/31/2023.

Briefing on Monitoring Activities



Other Activities

Other Activities

- Digitizing Paper Records: project underway to digitize participant records for WIOA Adult, Dislocated Worker, Trade Adjustment Assistance, TANF/Choices, SNAP, and any grants currently using hard-copy records (only Youth and Child Care Services are digitized).
- WSA Policy Review: about 95% complete – expect to complete within a couple of weeks.
- Aspen Institute: we did a presentation on “Income Inequality as an Outcome of the Labor Market.”
- Other: MIS (Local Plan, UI Weekly Job Search Requirements), Procurement (internal controls), and TANF Initiative (program design).

Monitoring Timeline – Internal Engagements



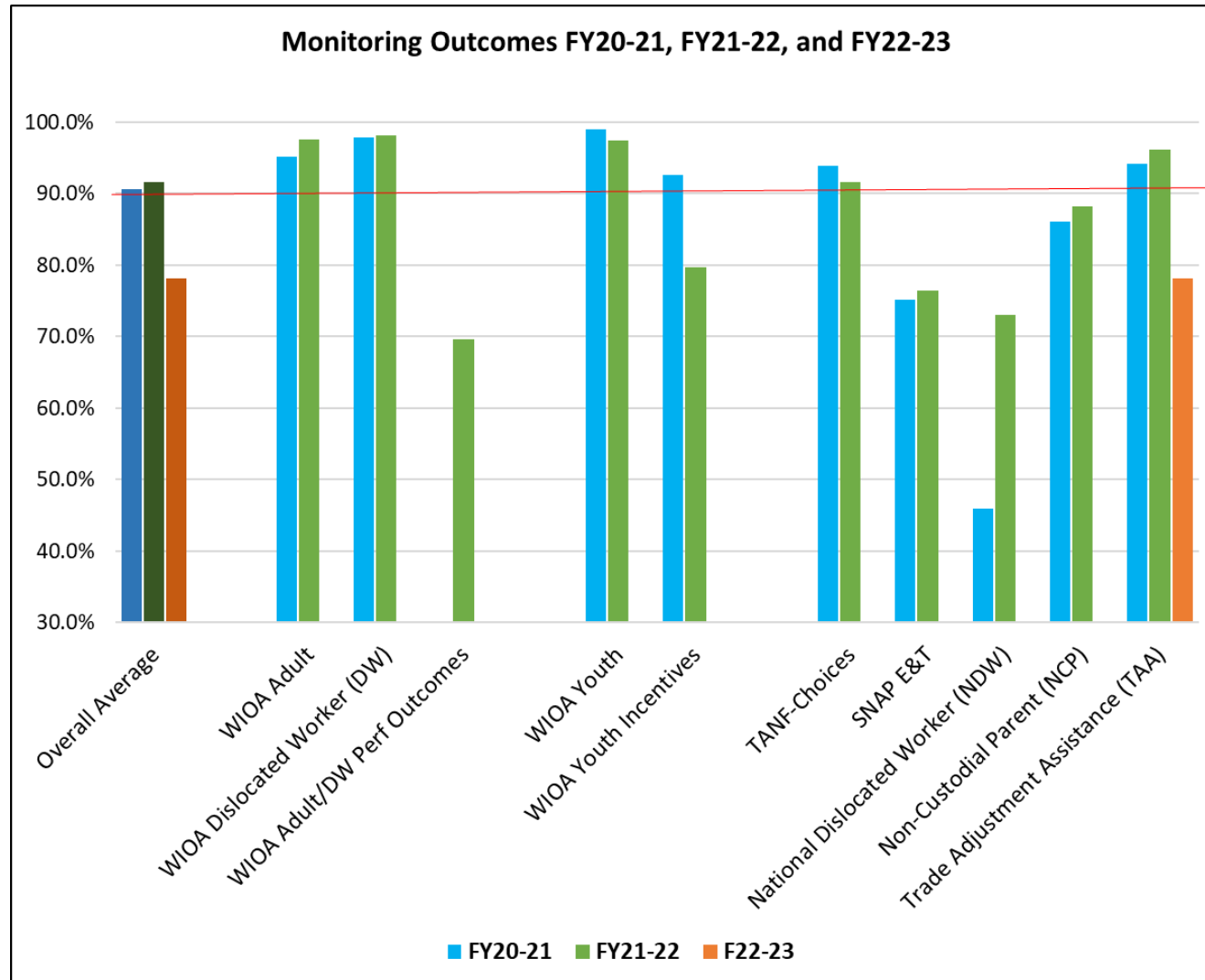
Initial Estimated Timeline				Actual Timeline						
<i>Internal Program Monitoring</i>	<i>Duration</i> ⁺⁺	<i>Start</i>	<i>Finish</i>	<i>Duration</i> ⁺⁺	<i>Effort</i>	<i>Variance</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>	<i>% complete</i>
Estimated Timeline: 2022-2023	215	11/14/2022	9/8/2023	Duration			10/11/2021	10/31/2022		45%
Trade Adjustment Assistance (TAA) - Phase I	49	11/14/2022	1/19/2023	75	55	26	11/14/2022	2/24/2023	Included delays for SNAP/NCP TAP for TWC's Monitoring, plus a 1-day extension for C2GPS.	100%
National Dislocated Worker (Phase II)	50	1/3/2023	3/13/2023				1/3/2023		Ongoing with delays for SNAP/NCP TAP for TWC's Monitoring.	69%
SNAP E&T										
Technical Assistance							11/1/2022		TAP for TWC's Monitoring. Ongoing.	
Annual Review	45	3/13/2023	5/12/2023				3/8/2023			
Non-Custodial Parent (NCP, Phase II)										
Technical Assistance							11/1/2022		TAP for TWC's Monitoring. Ongoing.	
Annual Review	45	4/20/2023	6/21/2023							
Child Care QIA	31	5/30/2023	7/11/2023							
RESEA	41	6/20/2023	8/15/2023							
Summer Earn & Learn (SEAL)	38	7/19/2023	9/8/2023							
Other (Phase II, TWC, Training, etc.)	50	8/24/2023	11/1/2023							
Avg Duration or Effort (days, excludes "Other") →	44			75	55	26				
Multi-tasking (% days overlapping projects) →	38.4%			100.0%						

Duration: total days from start to finish (includes some holidays); **Effort (or Work)**: actual number of days spent on each project.

Modification Notes

⁺⁺ The Duration is not equal to the time that the contractors are actively involved in the project - it includes additional internal QA work (e.g., desk and policy review and tool development,

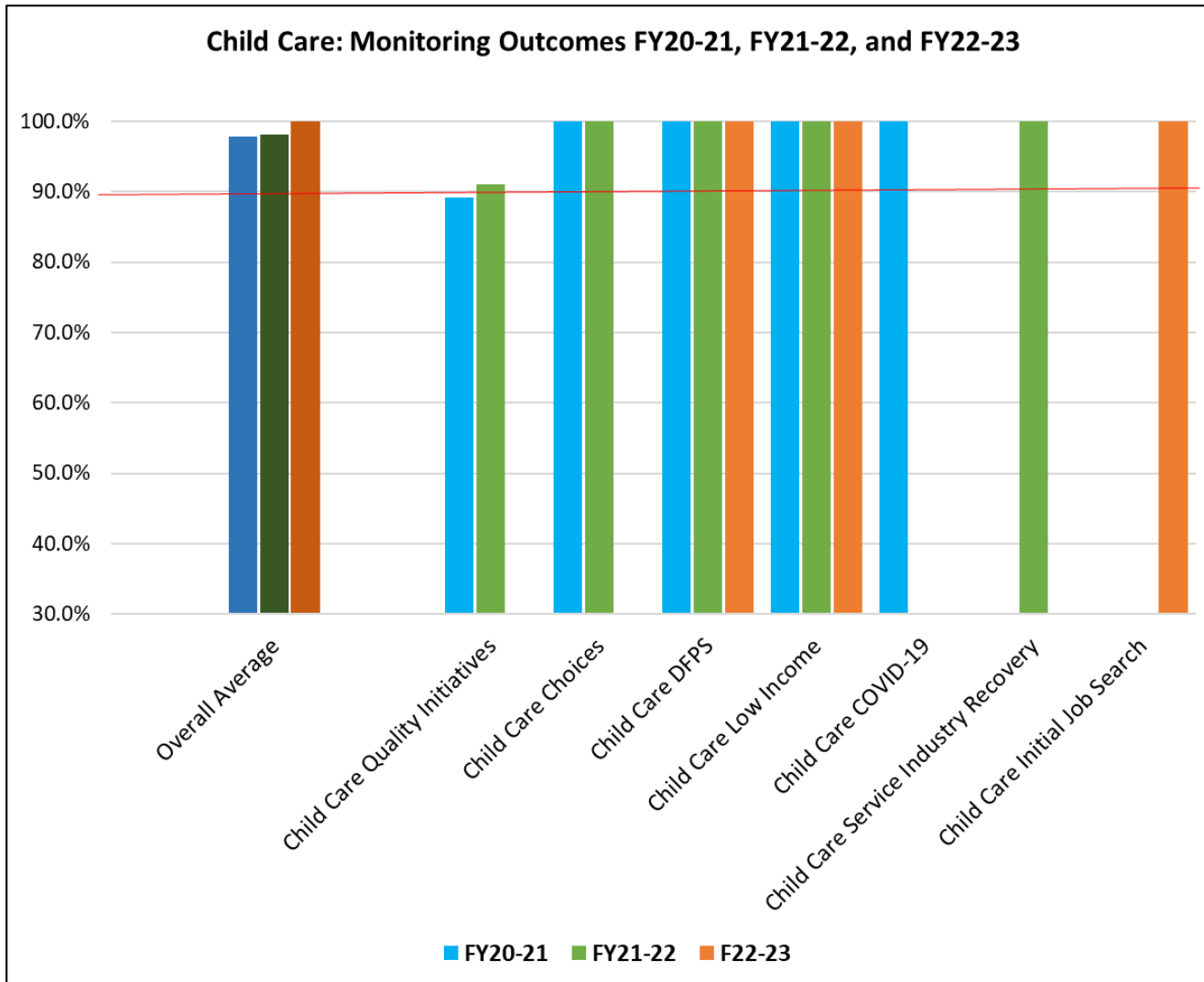
Briefing – Monitoring Outcomes



The chart summarizes outcomes of monitoring engagements for FY20-21, FY21-22, and FY22-23 (Oct-Sep timeframe)

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 (Oct-Sep timeframe).

The red line highlights the 90% expected accuracy rate.

Briefing – Technical Assistance



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

- updating policies and procedures,
- staff training,
- additional internal monitoring,
- increased oversight.

Successful strategies require the identification of root causes and the implementation of adequate actions.

Briefing – Technical Assistance



Additional QA Monitoring

- WSA Program/Operations implemented a TA Plan to address TWC's Audit Resolution Letter and Annual Monitoring Report for NCP and SNAP.

Expanded monitoring includes:

- 100% monthly review of cases by subrecipient,
- QA validation of subrecipient monitoring reports, and
- WSA testing of at least 20 cases per month.

Briefing on Monitoring Activities



Staff Recommendations

TWC requires Boards to have qualified Monitoring Staff to carry out the Board's oversight responsibilities:

- We thank the Board of Directors for their continued support of WSA's QA Department to promote the agency's compliance, internal controls, and continuous quality improvement efforts.



Questions or Comments?



WSA Quality Assurance TWC Performance – Measurable Skills Gains (MSGs) and Credential Rates

Dr. Ricardo Ramirez, Director of Quality Assurance

April 7, 2023





Summary

Briefing on TWC Performance:

- *Measurable Skills Gains (MSGs), and*
- *Credential Rates.*

Staff is not requesting Board action at this time.

Briefing on TWC Performance



TWC-contracted Performance Measures

- *Each year, TWC contracts require Boards to meet or exceed performance targets.*
- *Two of these measures include:*
 - *Measurable Skills Gains (MSGs), and*
 - *Credential Rates.*
- *These measures are tied to participant educational and training achievements.*
- *WSA uses TWC's Monthly Performance Report (MPR) to determine outcomes.*
- *WSA attaches TWC's performance to partner contracts and ties these to their profits.*

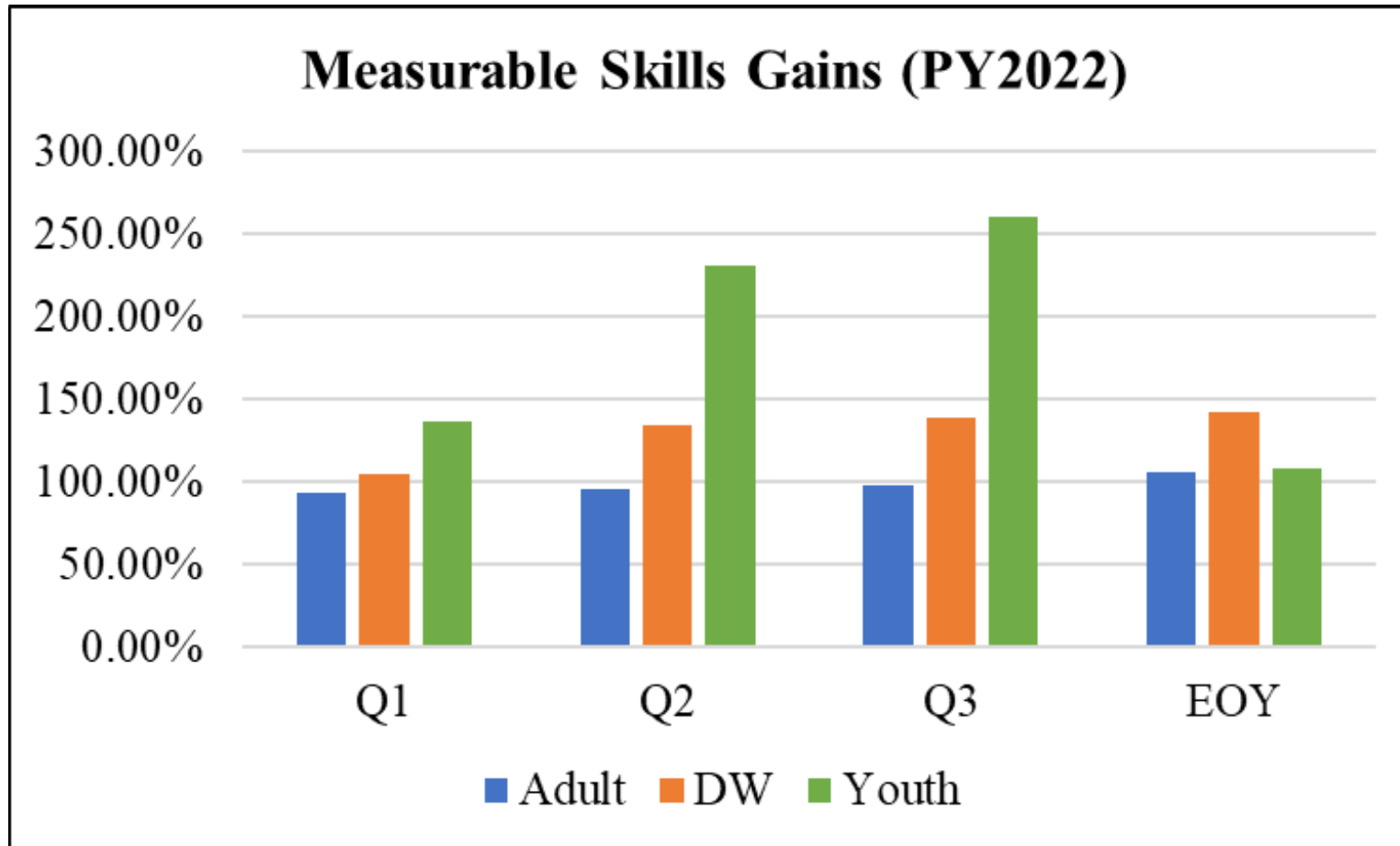
Briefing on TWC Performance



Measurable Skills Gains (MSGs)

- MSGs aim to capture the percent of participants who during the program year were enrolled in education/training that leads to an ‘industry-recognized occupational credential.’
- Examples:
 - Satisfactory Progress (for college/university and high school),
 - Training Milestones, and
 - Skills Progression.

Briefing on Monitoring Activities



For this past year, outcomes capture participants who gained skills from July 1, 2021, through June 31, 2022.

Meeting $\geq 90\%$

Exceeding $\geq 110\%$

Source: TWC's MPR

Briefing on TWC Performance



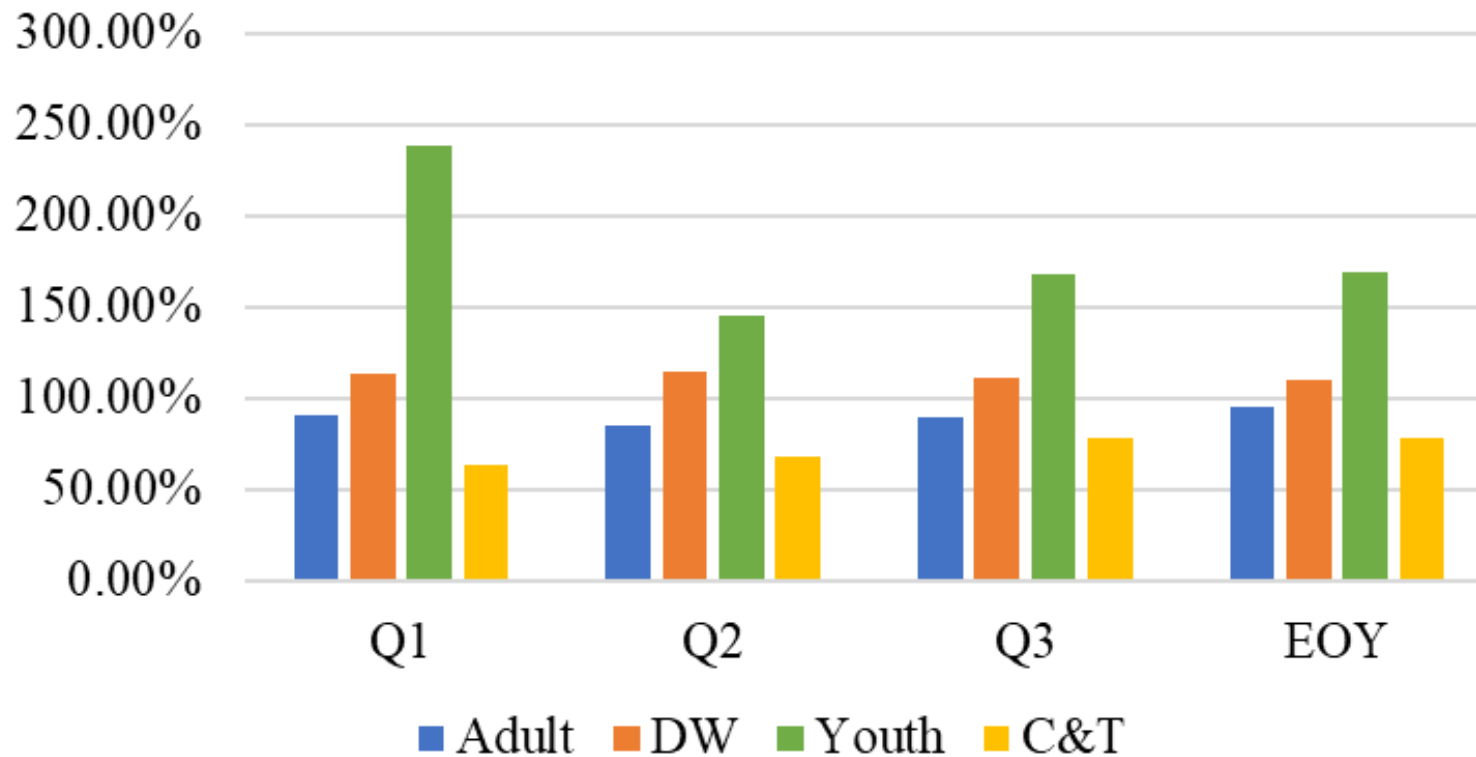
Credential Rate

- The Credential Rate captures the percent of Exiting Program Participants (Exiters) who were in training/education (with some exceptions) and who achieved a Recognized Credential within one (1) Year of Exit.
- *Examples include:*
 - *High School Equivalency/Diploma, Bachelors Degree, Master's Degree, Doctorate Degree, Registered Apprenticeship, Associate Degree, Occupational Skills License, and Occupational Certificate/Certification.*

Briefing on Monitoring Activities



Credential Rate (PY2022)



For this past year, outcomes capture participants who gained a credential within one (1) year of Exit, from January 1, 2020, through December 31, 2021.

Meeting $\geq 90\%$
Exceeding $\geq 110\%$

Source: TWC's MPR

Briefing on TWC Performance



- Attachments include:
 - TWC’s definitions of the two performance measures, and
 - WSA’s guidance to our partners which includes policy information and requirements from various sources (e.g., from TWC and Dept. of Labor).



Questions or Comments?