

**MEMORANDUM**

**To:** Board of Directors

**From:** Adrian Lopez, CEO

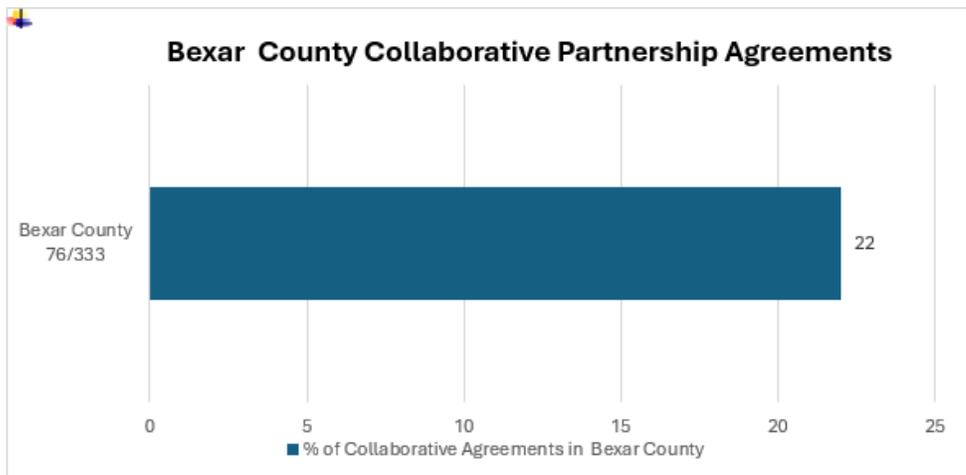
**Date:** September 12, 2025

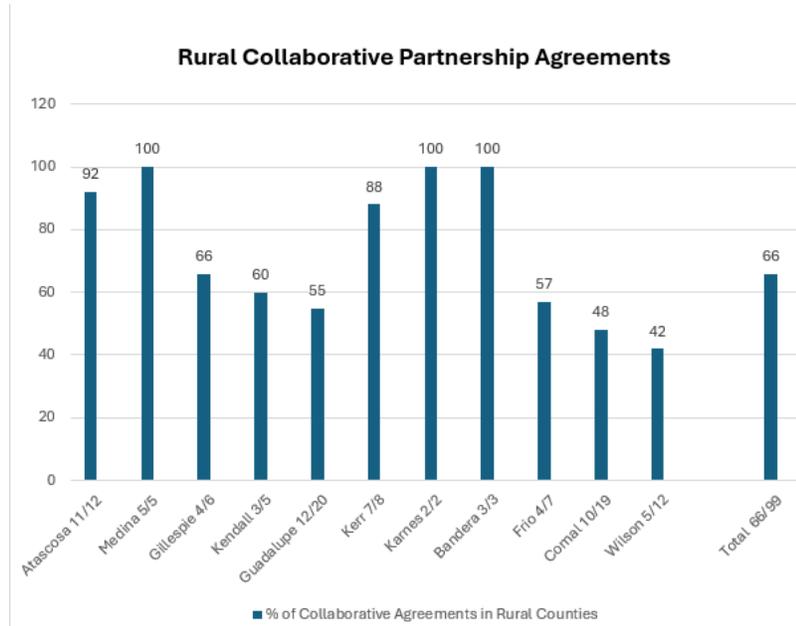
**Subject:** Texas Rising Star Business Coach Updates

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

**Key Highlights:**

- **Program Reach:** Collaborative Agreements: 142 Early Learning programs have partnered with the business coach (66 Rural, 76 Bexar).

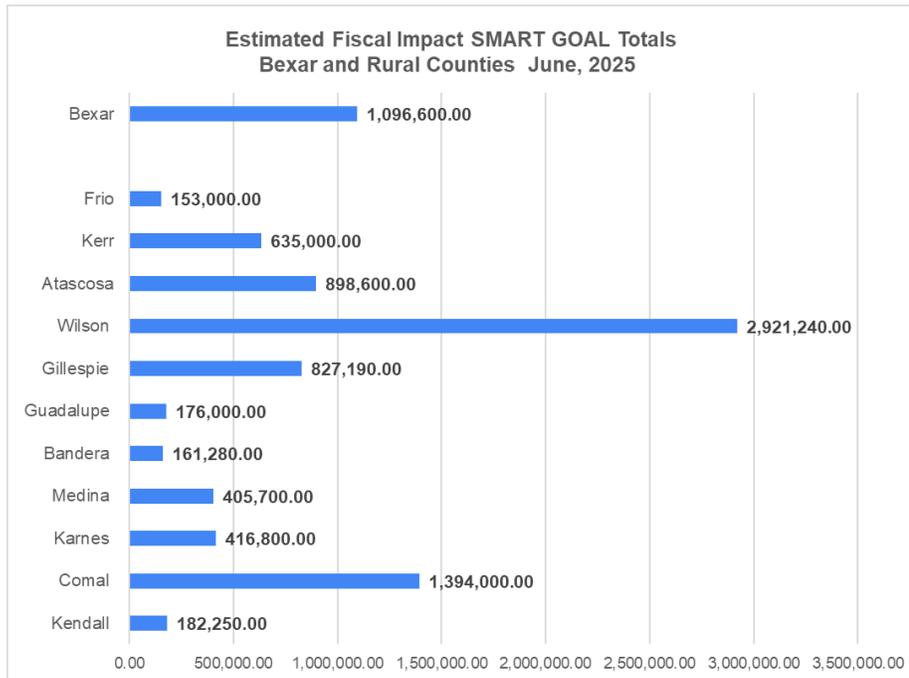




- SMART Goals include facility expansion, participation in food programs to recoup expenses, adding afterschool programs, and targeted initiatives designed to drive overall business growth and success.
- Resource Dissemination: UTSA, SBDC Weekly Business Training Updates and resources are distributed to an average of 575 Childcare Providers

The Business Coach signs a collaborative agreement to implement and establish a strong foundation for partnership with a childcare provider. This agreement outlines the role of a Business Coach in supporting the provider's growth and development. By working together, the Business Coach and Director's aim is to build a mutually beneficial relationship and ensure the provider is well-informed about the coaching resources available to them. After a collaborative agreement is signed on the following visit resources and a SMART goal is put together to assist the childcare on the immediate financial need identified to assist in the overall success of program.

**SMART Goals:** The figures presented in the table below represent the *Estimated Fiscal Impact* derived from collaborative SMART goal development with individual Childcare Directors / Owners during Business Coaching sessions. These projections are tailored to meet the unique needs of each center, encompassing a diverse range of strategic objectives.



Goals include facility expansion, participation in food programs to recoup expenses, adding afterschool programs, and targeted initiatives designed to drive overall business growth and success. The estimated figures reflect potential financial outcomes based on the successful implementation of their personalized SMART goals.

Ongoing Business Coaching sessions are conducted to monitor the implementation of the SMART Goals, provide continuous review, and offer supplementary resources or strategic adjustments as needed.

**Additional Key Accomplishments:**

- **UTSA-SBDC** partnership facilitation between childcare centers to access valuable resources for business planning, marketing support, expansion, etc.
- **Developed a Community Survey** to gather input and data from the Rural Communities, during Inter-Agency Meetings. Community Survey – was provided to Karnes, Wilson and Medina County to complete and provide information regarding childcare community needs.

- **New Business Coach Ms. Cecilia Ibarra** On- Boarding Training
- **Bi-Annual Survey Data** Review and Contacted Childcare Centers who did not complete survey, Captured an Average of **165 provider responses** to a 50-question survey.
- Connected with the **Chamber of Commerce** in Karnes City, they discussed Membership information and Childcare Provider membership.
- **Inter-Agency Meetings** – Comal, Karnes, Bandera, Wilson gathered resources to share with providers to assist them with Business Resources from their community.
- **TEA- Pre-k Partnership Meeting-** to discuss upcoming changes ISD partnership opportunities
- **Business Service Meeting-** partnering with additional services from WSA (WIOA, Workforce Innovation Opportunity Act, Ready to Work program, Quest program etc.)
- **United Way Food Bank Training (Fill Your Cup)** - attended and assisted participants on CACFP, Partnering with Food Bank, and the importance of wellness for Directors.
- **Lift Training** – Prep and Train for providers on Saturday, June 28, 2025, currently 40 providers registered.

**Alternatives:** N/A

**Fiscal Impact:** N/A

**Recommendation:** N/A

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



**MEMORANDUM**

**To:** Board of Directors

**From:** Adrian Lopez, CEO

**Date:** September 12, 2025

**Subject:** **Trauma-Informed Contract for Centers**

**Summary:** Counseling and Health Support for Trauma Informed Services for Early Learning Programs.

**Project Description:** Workforce Solutions Alamo issued an RFP for providers to deliver Counseling and Health Support for Trauma-Informed Services to Early Learning Programs located in Atascosa, Bandera, Bexar, Comal, Frio, Gillespie, Guadalupe, Karnes, Kendall, Kerr, McMullen, Medina, and Wilson. Early Learning Programs include but are not limited to Licensed Child Care Centers, Licensed Child Care Homes and Registered Child Care Homes. The goal was to ensure that the early learning environments are supportive of the mental and emotional well-being of young children, their families, and early childhood educators, who may have experienced trauma. The services are aimed at promoting resilience, social-emotional development, and overall well-being. The Ecumenical Center was awarded the contract for the following services that will be available to Early Learning Centers for the Alamo Board area:

<b>Item</b>
Trauma Informed Care Certification
Trauma- Informed Advocate Certificate Program
Staff Wellness Group Therapy
Individual Counseling Services
Support Groups
Crisis Response Services

**Fiscal Impact:**

Contract Year 1: June 15, 2025 to June 14, 2026

- Budgeted amount: outlined in agreement

Contract Year 1: June 15, 2026 to June 14, 2027

- Budgeted amount: outlined in agreement

**Recommendation:** N/A

**Next Steps:** Processes have been created between WSA and the Ecumenical Center for providing services requested or needed by Early Care Centers.

(15) Centers have already expressed interest in or are in need of one or more of the following services:

- Trauma Informed Care Certification
- Trauma Informed Advocate Certificate
- Crisis Response



## MEMORANDUM

**To:** Board of Directors

**From:** Adrian Lopez, CEO

**Date:** September 12, 2025

**Subject:** Co-Op Updates

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

To this end, the following actions have been taken:

- **Understanding Rural Needs through Survey:** A Biannual Survey, issued in March 2025, was distributed to child care programs with active CCS agreements to gather feedback on needs and priorities.
  - The survey was emailed on March 13, 2025, with a submission deadline of March 28, 2025.
  - As of April 1, 2025, WSA Data team members provided the survey.
  - Preliminary results were available by April 3, 2025.
  - Data clean-up by Child Care staff occurred on April 17, 2025.
  - Staff reached out to Providers to clarify "NA" responses on April 29, 2025.
  - Mentor phone outreach was conducted from May 12 to May 16, 2025.
  - The survey results were compiled by the Data team by June 20, 2025.
  - Out of 562 surveyed, 151 responded, representing a 26% response rate.
  - The survey included 38 focused questions guided by WSA Child Care strategic plan, covering program capacity, enrollment/waiting list, staffing, business needs, professional development need, and partnerships and resources.
- **Initial Research and Community Engagement:**
  - The Childcare team has initiated research into the structural components of successful co-op models.

- The Business Coach conducted visits to rural areas for feedback (completed February 27, 2025), with weekly updates provided in the Executive Weekly Report.
- We are continuing to review informational articles and materials to learn from existing successful co-op models and identify potential resources and support avenues, including reviewing information from USDA Rural Co-operatives.
- Based on initial survey results, providers mentioned needing food assistance; contact was made with local food banks to request points of contact for San Antonio and rural area food banks.
- **Partnership Development:**
  - Discussions occurred regarding meetings with ISDs (a virtual meeting was held on February 7, 2025, and a follow-up was scheduled). We are seeking additional information to determine areas/counties where partnerships may already exist to potentially initiate co-ops.
  - The Chairwoman identified and initiated some potential partners, and WSA completed an RFP for trauma informed services.
  - We are engaged in discussions with our Alamo Quality Pathway partners and are moving forward with launching our next Provider Council, working closely with our CEO to share information with area judges.
  - We are actively researching existing community initiatives, meetings, and relevant activities to identify potential partnership opportunities for Workforce staff and determine how we can effectively contribute to ongoing efforts.
- **Internal Alignment:** Reviews of SMART childcare goals with key stakeholders,
  - We are diligently progressing through Phase 1 of the co-op project, currently in the Exploratory and Research & Study stages. To ensure the most impactful strategic direction, the development of our project roadmap, initially slated for April 1st to May 1st, 2025, has been thoughtfully adjusted. This allows for a more comprehensive data acquisition and review, providing us with a robust understanding of stakeholder needs throughout WSA's service counties. We look forward to sharing further updates as we continue to advance through the subsequent phases; Including discussions on co-op status, were held on February 11, 2025.

**Alternatives:** N/A

**Fiscal Impact:** N/A

**Recommendation:** N/A: This is an update only

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



## MEMORANDUM

**To:** Board of Directors

**From:** Adrian Lopez, CEO

**Presented By:** Victoria Rodriguez, Director of Workforce Services

**Date:** September 12, 2025

**Subject:** **Youth Program Briefing and Performance**

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**Summary:** For Program Year 2025, Workforce Solutions Alamo (WSA) continues its partnership with youth contractor SERCO to oversee enrollments and provide education, training, and skills essential for workforce success. WSA maintains active communication with SERCO to ensure performance goals align with the Texas Workforce Commission's (TWC) target range of 95-105% while staying within the allocated budget.

### **Analysis:**

#### Participant Planning Summary (PPS)

The PPS aims to ensure that the Youth Service Provider serves the most significant number of participants and provides them with services that lead to successful training and employment outcomes. The PPS includes quarterly and yearly targeted enrollment (participants to serve) and service goals for eligible clients. While enrollment goals include serving the most significant possible number of eligible participants, the quality of customer service remains a top priority. The breakdown for the third quarter of the Program Year is as follows:

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- **In-School Youth:** WSA has allocated **\$173,055** towards **work experience opportunities**, helping students gain hands-on exposure to real-world jobs. Additionally, **\$2,730** has been invested in **support services** to remove barriers to success.
- **Out-of-School Youth:** WSA has committed **\$342,252.98** to **work experience programs**, equipping young individuals with critical job skills. Furthermore, **\$13,773** has been provided with **support services**, while an additional **\$40,878** has been dedicated to **individual training** to enhance employability and career advancement.

These strategic investments reinforce WSA's commitment to empowering youth through education, training, and hands-on work experience, ensuring they are prepared for the workforce and long-term career success.

**Recommendation:** WSA will continue utilizing WIOA Youth Workforce Reports at the Board level. If performance deficiencies arise, the youth contractor must submit an Exception Report outlining corrective actions.

To enhance performance, the contractor must make documented efforts to contact participants and collect employment and education outcomes for reporting accuracy. WSA and SERCO will closely monitor performance to maintain enrollment levels that support continued success while ensuring the contractor exceeds all performance measures.

**Next Steps:** WSA and the youth contractor will continue to monitor performance and work to ensure that enrollment remains at a level that does not negatively impact performance, and that the youth contractor continues to exceed all performance measures.



## MEMORANDUM

**To:** Board of Directors  
**From:** Adrian Lopez, CEO  
**Presented By:** Victoria Rodriguez, Director of Workforce Services  
**Date:** September 12, 2025  
**Subject:** Career Exploration Events

**Summary:** This memo provides an update on Workforce Solutions Alamo’s (WSA) Youth Career Exploration events and special initiatives for Program Year 2025 (PY25).

As outlined in Section 5.5 of the Workforce Commission Initiatives (WCI) Grant Statement of Work, WSA will utilize TANF grant funds to support Jobs Y’all career exploration events for middle school, high school, and postsecondary students. These events will engage employers in meaningful ways to help students explore career opportunities, understand pathways to in-demand careers, build networks, and access internships and other hands-on learning opportunities. Parents will also be encouraged to attend to support their child’s career exploration journey. Events will be branded under Jobs Y’all and may include WSA-specific branding, with scheduling determined at the local level.

For FY2025, WSA has hosted four major youth career exploration events targeting various industries and youth sub-populations, with additional co-hosting opportunities currently under discussion.

### Analysis:

#### Past Career Exploration Events

1. CTE Showcase – February 14, 2025
  - a. Hosted in recognition of Career & Technical Education (CTE) Month, this first-ever event celebrated CTE programs and their role in preparing youth for diverse career paths.

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- b. Over 450+ students attended the event, aimed at generating excitement and awareness among middle school students.
- 2. Fiesta of Opportunities - April 25, 2025
  - a. Designed for opportunity/disconnected youth (not currently working or in school), this event offered career exploration, industry exposure and pathways to employment, college programs, vocational training, and certifications.
  - b. There were 102 opportunity youth present who benefited from attending a YES! Presentation, Financial Wealth and Mental Health session, created a Work in Texas Account, and attended a career fair with 16 employers and 9 community resource organizations.
- 3. The World of Work (WOW) Youth Expo - May 8, 2025
  - a. Part of the nationwide Youth Apprenticeship Week (YAW) initiative, which highlights the value of Registered Apprenticeships for youth ages 16-24.
  - b. Focused on engaging rural communities and schools that attended SA Stock Show & Rodeo Ag Mechanics Tradeshow aiming to promote regional apprenticeship programs and other hands-on learning while earning opportunities.
  - c. There were 123 high school students from the following rural ISD's:
    - i. Dilley HS
    - ii. Natalia HS
    - iii. Devine HS
    - iv. Pearsall HS
  - d. Students heard about the Texas FAME initiative, heard from an Employer Q&A Panel, participated in a student lead Fashion Show, and visited booths consisting of 10 employers in the trades industry and 4 Community Resources.
- 4. 2025 Intern Day SA! – July 31, 2025
  - a. Aimed at high school juniors, seniors, and college students, this event will connect youth with internship opportunities to reinforce skills through work-based learning.
  - b. Employers will showcase available internships to foster real-world experience and career readiness.

**Alternatives:** N/A



**Fiscal Impact:** WSA’s strategic investments in staff and career exploration events create lasting impact by equipping youth and their families with the knowledge and resources needed to pursue sustainable careers. By empowering young individuals with viable career pathways early on, these efforts reduce long-term reliance on social programs and build a stronger, self-sufficient workforce for the future.

**Recommendation:** To continue to partner with other youth-serving organizations and schools, leverage resources, maximize efforts for increased youth attendance, and overall reach the highest number of youth and expose them to Workforce Solutions Alamo, the YES! Program, and most importantly, career pathways.

**Next Steps:** Continue with the planning of the upcoming youth events and discuss what the partnership with partner agencies consists of for next program year’s events.



## MEMORANDUM

**To:** Board of Directors

**From:** Adrian Lopez, CEO

**Presented By:** Victoria Rodriguez, Director of Workforce Services

**Date:** September 12, 2025

**Subject:** Youth Model Update

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### Summary:

This memo provides an update on WSA's Career POP Youth Service Delivery Model, which aims to enhance career readiness and support for youth. We are introducing the Career POP logo, implementation strategy for tailored presentations geared towards specific audiences that emphasize collaboration with local organizations, employers, schools, and youth, continuous feedback, and adaptability to ensure effective service delivery and maximize impact on youth career readiness.

### Analysis:

Introducing the Youth Service Delivery Model logo, Career POP, in which POP stands for Pathways, Opportunities, and Possibilities. Career Pop is designed to enhance career readiness for youth aged 14-24. It highlights the increasing demand for career services and identifies gaps in access to resources and mentorship. The goal is to improve employment opportunities and skills development among young people to meet future workforce needs.

Custom presentations for distinct groups will ensure relevance and targeted messaging. Each presentation will include benefits relevant to that audience.

The timeline with next steps are as follows:

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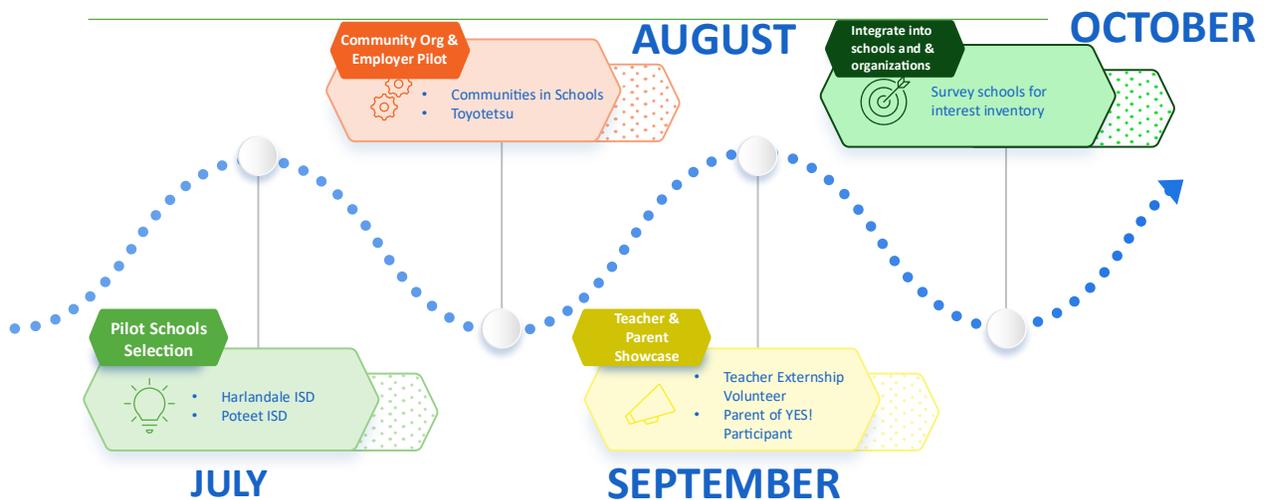
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# Timeline



# NEXT STEPS



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### Strengths:

- Clear timeline with progressive steps leading to implementation.
- Inclusion of key stakeholders such as community members, educators, and parents.
- Strategic approach from model development to integration in schools.

### Challenges:

- Requires coordinated effort across multiple phases.
- Potential funding and resource constraints.
- Implementation risks such as school participation and stakeholder engagement.

**Alternatives:** Instead of a linear rollout, a phased pilot approach could be considered:

Phase 1: Pilot in one rural and one urban school before broad integration.

Phase 2: Gather feedback and refine the Model based on early results.

Phase 3: Expand implementation over a longer period with added support structures.

**Fiscal Impact:** Projected costs include costs for Model development and Model development and updates (consulting, research, materials), stakeholder engagement (events and/or marketing), and school integration (training and resources including Workforce One)

**Recommendation:** It is recommended that we ensure logistical and operational readiness before implementation, engage stakeholders continuously to refine the model, and develop contingency plans for potential delays or participation challenges.

**Next Steps:** Next plan of action includes defining any budget requirements and allocation of necessary resources, continuing with RFP to oversee implementation, and conducting an initial pilot study in select schools before full rollout.



## MEMORANDUM

**To:** Board of Directors

**From:** Adrian Lopez, CEO

**Presented by:** Sandra Alvarez, Assistant Director of Workforce Services

**Date:** September 12, 2025

**Subject:** Department of Labor (DOL) Infrastructure Grant

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**Summary:** This item is to provide information on the recent DOL award for San Antonio Infrastructure Academy. The Building Pathways to Infrastructure Jobs grant was awarded to WSA on October 1, 2024. The total grant amount is \$2,000,000 for five years to analyze and fill gaps in the construction industry to expand transportation infrastructure and enhance renewable energy projects in the Alamo Region.

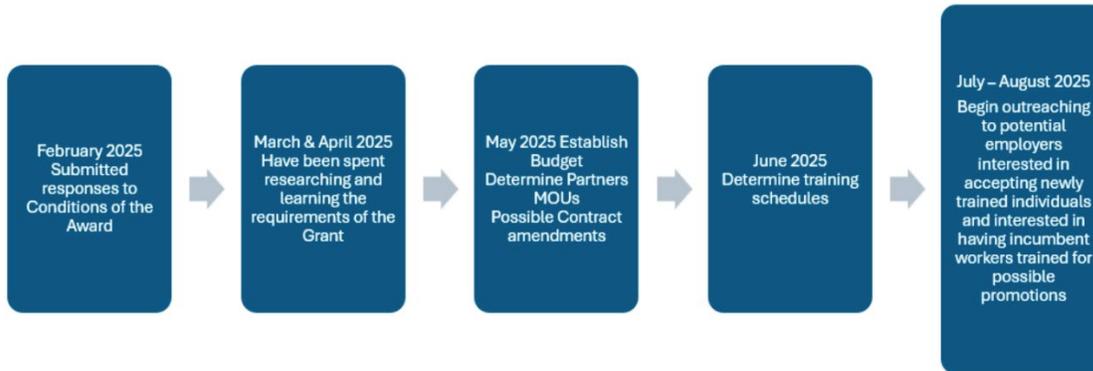
**Analysis: DOL-Contracted Performance:** The Department of Labor contracted WSA for five years to provide 250 participants services, training, upskilling and assessments. This will include unemployed, underemployed and incumbent workers. This opportunity provides additional resources to WSA for career pathway expansion in renewable energy, transportation and broadband industries to support the growing infrastructure in the Alamo region.

**Alternatives:** No alternatives are being considered currently.

**Fiscal Impact:** WSA's budget increased by \$2,000,000. The return on investment is in the form of participants wages after completing the training and entering or advancing in employment with mean wages of \$94,973.

**Recommendation:**

This grant is in progress. WSA's responses to Conditions of the award have been submitted and approved by DOL. We have met with potential training partners for this grant. One training provider is willing to start a cohort for Fiber Optic training. July and August are being utilized to determine employers willing to not only hire newly trained individuals but also to have their own incumbent workers trained for possible promotions. WSA continues to create MOUs and there could be possible contract amendments created for this grant.



This project is focused on but not limited to occupations such as Electrical Trades, Welding Trades, Information Technology, Fiber Optics, Energy Vehicles and Quality Assurance Analysts & Testers. WSA continues to receive technical guidance from DOL to create and provide a comprehensive employer and participant plan to ensure the program success. WSA will continue to provide updates to the committees and the Board of Directors.

**Next Steps:** Next steps include garnering employer interest and aligning WSA's current resources with this grant's expected outcomes.

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## MEMORANDUM

**To:** Board of Directors

**From:** Adrian Lopez, CEO

**Presented by:** Victoria Rodriguez, Director of Workforce Services

**Date:** September 12, 2025

**Subject:** TX FAME

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

These events represent key milestones in the TX FAME program calendar, celebrating participant accomplishments and fostering ongoing stakeholder engagement. May's graduation celebrated thirty-eight individuals, and the upcoming cohort will commence with forty participants.

### Key Dates and Events:

- **February 22, 2025-** TX FAME AMT Open House Recap
- **May 22, 2025** – Graduation
- **August 13, 2025** – AMT Signing Day
- **August 2025-** Fall Semester Start

**Analysis:** TX FAME is focused on developing a skilled manufacturing labor pipeline to address the increasing demand for talent in the sector. Recruitment efforts are employer-driven, ensuring the selection of candidates with the desired qualities and skills. Employers collaborate with each other and local school districts to establish a talent pipeline, with training provided through local community colleges. Upon completion of their training, FAME participants earn an associate's degree in applied science and advanced manufacturing technology, along with two years of work experience. The shared goals of TX FAME and WSA have resulted in a groundbreaking



partnership. After evaluating its resources, WSA has identified TX FAME as a primary focus of its youth service delivery model. The model will be used to recruit and guide participants through five key stages:

- **Exposure:** Introducing and promoting career awareness in manufacturing. Activities such as factory tours, career fairs, and interactive workshops aim to spark youth interest and dispel misconceptions about the manufacturing industry.
- **Engagement:** Facilitating employer engagement with students through mentorship programs, guest lectures, and career exploration events. These opportunities help students gain insights into the industry and build valuable networks.
- **Exploration:** Providing career exploration opportunities through hands-on projects and simulation activities. These experiences help students identify their interests and guide them toward suitable career paths.
- **Experience:** Assisting youth with internships, apprenticeships, and applied learning opportunities. By working directly with employers, students gain practical experience and develop essential workforce skills, ensuring a smooth transition from education to employment.
- **Empowerment:** Helping youth realize their potential in advanced manufacturing pathways. This stage focuses on equipping students with the skills and confidence needed to succeed in the industry. The TX FAME program also reduces financial barriers, often enabling students to graduate debt-free.

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

**Fiscal Impact:** The partnership will require an allocation of resources to support recruitment, training, and program administration. However, the long-term benefits of a skilled workforce and reduced unemployment rates outweigh initial costs. Additionally, WSA has applied for a grant opportunity for approximately \$350,000 to supplement the activities for TX FAME.

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

**Next Steps:** WSA will plan and execute the dates above in collaboration with partners. Additionally, WSA is taking steps to host a convening for FAME chapters in Texas.



## MEMORANDUM

**To:** Board of Directors  
**From:** Adrian Lopez, CEO  
**Presented By:** Victoria Rodriguez, Director of Workforce Services  
**Date:** September 12, 2025  
**Subject:** Teacher Externship

**Summary:** The Externship for Teachers program is designed to strengthen educators' understanding of local workforce trends—particularly in STEM careers—within the Alamo region. Approximately 100 teachers will participate in five-day externships, both on-site and virtually, with 15–20 local businesses. The experience will help teachers align classroom instruction with real-world applications, ultimately better preparing students for future careers.

**Analysis:** The program directly supports the strategic goals outlined in the Alamo Local Plan by focusing on key regional industries, including manufacturing, education, healthcare, IT/cybersecurity, construction, and finance. Teachers will engage in professional development, including virtual and hybrid training sessions, and create lesson plans based on their externship experiences. Workforce Solutions Alamo (WSA) will provide three one-hour courses and induct participants into the Alamo Workforce Ambassador program. This ambassador program engages educators in workforce events, outreach, and leadership roles related to career education. This initiative helps bridge the gap between education and industry by making career pathways more visible and relevant to students through their teachers.

**Alternatives:** N/A

**Fiscal Impact:** The full implementation involves 100 educators and 15–20 business partners will require funding for coordination, training, materials, and stipends for educators who complete the program. Costs include:

- Staff time for program development and business outreach
- Training facilitation and content development
- Technology and platform costs for virtual components
- Teacher stipends or substitute coverage if needed
- Promotional materials and collateral for outreach and branding
- Educator stipends of \$500

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Funding is sourced through existing workforce development grants and in partnership with local education agencies and businesses.

**Recommendation:** Staff recommends applying for the 2026 Externships for Teachers grant through TWC and partnering with agencies that align with WSA’s mission, and the priorities outlined in its Local Plan.

**Next Steps:**

- Draft 2026 application.
- Incorporate the CREW Teacher Apprenticeship opportunity.
- Add Alamo Colleges facility tours.
- Garner new partnerships to expand opportunity.



**MEMORANDUM**

To: Board of Directors

From: Adrian Lopez, Chief Executive Officer

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

Date: September 12, 2025

**Subject: TWC Annual Monitoring Update**

**SUMMARY:** Quality Assurance briefing on TWC’s Annual Monitoring. The item does not require Board action.

**BACKGROUND:** Boards are subject to TWC audits, reviews, and comprehensive monitoring activities to ensure that programs achieve their intended results while maintaining fiscal accountability and compliance with applicable laws, rules, and regulations in adherence to uniform administrative requirements for grants and agreements.

**TWC Audit Resolution**

TWC’s annual monitoring required WSA to implement continuous quality improvement for one item. This involved outstanding checks associated with bank reconciliations, for which staff updated procedures, developed and provided staff training, and incorporated internal reviews.

On June 12, 2025, TWC issued an “*Audit Resolution Report*” to WSA. In it, TWC reports that WSA’s corrective actions adequately resolved the finding, reflecting that the Board has adequate controls to ensure the accountability of public funds, and that all outstanding checks are reconciled according to federal, state, and local requirements and guidelines.

With this, the TWC Monitoring Report 25.20.0001 is now closed.

**TWC Annual Monitoring**

TWC’s Annual Monitoring for this year is underway. WSA received an Engagement letter confirming that the on-site review will occur from October 14, 2025, to October 24, 2025.

<b>Num</b>	<b>Process</b>	<b>Est. Date</b>
1	Engagement Letter	7/15/2025
2	Document Request Package (DRP)	8/19/2025
3	Sample Request	10/08/2025

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4	Entrance Conference	10/14/2025
5	On-Site Review	10/14/2025
6	Exit Conference & Exit Report	10/24/2025
7	TWC Monitoring Report	04/03/2026

**STAFF RECOMMENDATIONS:**

- Hold meetings with Board and Contractor staff in preparation for the monitoring.
- Set up the technical aspects for the review (e.g., TEAMS channels, TWC Auditors’ VPN access).
- Coordinate each phase with WSA departments and Contractors, including staff assignments, deadlines, and document submission, ensuring responsiveness and promptly addressing each item that may arise.

**FINANCIAL IMPACT:** None.

**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:**

1. TWC Audit Resolution Report
2. TWC Engagement Letter

# Texas Workforce Commission

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Commissioner Representing  
the Public

Alberto Treviño, III  
Commissioner Representing  
Labor

Joe Esparza  
Commissioner Representing  
Employers

Edward Serna  
Executive Director

June 12, 2025

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

## Audit Resolution Report

Dear Mr. Lopez:

Workforce Solutions Alamo (Board) administers 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. In Fiscal Year 2025 TWC conducted a monitoring review of these programs and had one finding, as documented in Monitoring Report #25.20.0001. This letter is about the audit resolution of the finding, as outlined below:

**Finding:**        Strengthen Controls Over Bank Reconciliations

The Board does not have adequate controls over bank reconciliations. Monitors found 25 checks that were outstanding over 90 days from issuance, totaling \$28,310.05. Monitors noted that some checks were issued in 2018.

Without effective internal controls over cash management, the Board cannot maintain accountability and safeguard public funds.

**Corrective Action Taken:**

The Board has adequate controls in place to ensure accountability of public funds, and that all outstanding checks are reconciled according to federal, state and local requirements and guidelines. The Board provided a copy of its updated policies and procedures for bank reconciliations along with the corrective actions taken to address the outstanding checks identified in the finding. In addition, the Board provided recent bank reconciliations with no outstanding checks over 90 days from issuance. Lastly, the Board provided agenda and sign-in sheet for training conducted by its fiscal leadership to staff responsible for preparing the monthly bank reconciliations.

Because the corrective actions taken adequately resolves the finding, TWC Monitoring Report #25.20.0001 is closed. We encourage the Board to continue its efforts in following and adhering to federal, state and local requirements and guidelines, as the area noted above will be tested during subsequent monitoring reviews.

Mr. Lopez  
Page 2  
June 12, 2025

Thank you for your assistance on this matter. If you have any further questions, please contact Judy Ohn at (737)-802-9398 or [judy.ohn@twc.texas.gov](mailto:judy.ohn@twc.texas.gov).

Sincerely,



Jason Stalinsky, Esq.  
Interim Division Director  
Division of Fraud Deterrence and Compliance Monitoring

cc: Leslie Cantu, Chair, Workforce Solutions Alamo

**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**

M. Frank Stluka, Acting Regional Administrator, Employment and Training Administration  
and Administrative Services Region IV - Dallas, USDOL/Employment and Training  
Administration

# Texas Workforce Commission

A Member of Texas Workforce Solutions

Bryan Daniel, Chairman  
Commissioner Representing  
the Public

Alberto Treviño, III  
Commissioner Representing  
Labor

Joe Esparza  
Commissioner Representing  
Employers

Edward Serna  
Executive Director

July 22, 2025

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

Dear Mr. Lopez:

We plan to conduct a review of your grant agreements during the weeks of **October 14, 2025, and October 20, 2025**. The monitoring team will review fiscal and programmatic operating systems to ensure that administrative, organizational, and managerial elements exist to support effective program management.

Concerns or issues will be discussed with management throughout the review. A report will be issued containing any findings or areas of concern resulting from the review.

Indicate your concurrence with the date of the review and return the signed document electronically to **Ernesto Cantú**, Project Manager, at [Ernesto.Cantu@twc.texas.gov](mailto:Ernesto.Cantu@twc.texas.gov). You may also reach him at (737) 710-4488, if you have any questions or need additional information.

Please list a contact person for your organization and his or her telephone number and e-mail address. We will contact this person before the review to request information that will assist us in our review preparation. We would appreciate receiving your confirmation by **July 29, 2025**.

Sincerely,



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

Attachment

cc: Leslie Cantu, Chair, Workforce Solutions Alamo



## MEMORANDUM

To: Board of Directors

From: Adrian Lopez, Chief Executive Officer

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

Date: September 12, 2025

**Subject: Quality Assurance Update**

---

**SUMMARY:** Quality Assurance briefing on WSA monitoring activities. The item does not require Board action.

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

- *WIOA Adult - C2 GPS:* 100% complete with an overall 93.81% accuracy rate. The testing included: Eligibility, Support Services, Performance Management, Case Management, with four (4) attributes for continuous improvement:
  - Documenting the availability of other resources before issuing support services (89.66%).
  - Performance Credential Outcomes data entry accuracy (88.89%).
  - Employment verification at program entry and documenting unemployment status for 27 or more consecutive weeks (83.33%).
  - Monthly contact documentation, including two attempts per month (63.33%).
- *WIOA Dislocated Worker - C2 GPS:* 100% complete with an overall 91.62% accuracy rate. The testing included: Eligibility, Support Services, Performance Management, Case Management, with five (5) attributes for continuous improvement:
  - Documenting the availability of other resources before issuing support services (76.19%).
  - Support services case notes and WIT Activities ribbon (80.95%).
  - Performance Measurable Skills Gains Outcomes data entry accuracy (85.71%).
  - Service activity codes, and open and closed service dates (87.50%).
  - Monthly contact documentation, including two attempts per month (50.00%).
- *Non-Custodial Parent Choices (NCP) – C2 GPS:* 100% complete. Currently working on the Final Report.
- *WIOA Youth – SERCO:* 49% complete.

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

- *Supplemental Nutrition Assistance Program Employment and Training (SNAP E&T) – C2 GPS:* 100% complete.

- The testing resulted in a “Phase I” report with eight (8) attributes needing continuous improvement efforts.
- Phase I reviews provide the contractor with the opportunity to address the issues and demonstrate improvement within a two to three-month period. This includes intensified internal controls/monitoring, staff training, and procedural reviews.
- The results will then be reported with a Phase II review.
- *Contractor QA Review (C2GPS, SERCO, and COSA) 58% complete.*
  - QA is reviewing the contractors’ internal monitoring, which includes several elements that we’ll use for feedback and strengthening of the systems, including:
    - Comparing the attributes they test with ours and TWC’s.
    - Comparing the score results from their testing with ours and TWC’s.
    - Reviewing potential causes for any variation in outcomes (e.g., staffing, methods, frequency, etc.).

**Other Activities:**

- Some of the additional activities performed by QA include, but are not limited to, the following: initiating WSA Staff Training; Developing 2025-2026 performance targets for Adults and Youth; Assisting with the agency’s Risk Assessment; Reviewing and providing guidance on varied policy-related items.

**STAFF RECOMMENDATIONS:**

- To track the progress of actions, QA continues performing informal testing of attributes with accuracy rates below the 90% threshold.
- Staff focus on the most critical items, such as repeat findings or those impacting performance and funding.
- The continuous improvement system features a feedback mechanism that enables collaboration among Operations, our contractor partners, and QA to drive progress.

**FINANCIAL IMPACT:** WSA’s External Program Monitoring contract with Ms. Christine Nguyen, CPA: \$225,000.

**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 Timelines.



### Estimated Timeline – External Program Monitoring Activities 2024-2025

Initial Estimated Timeline				Actual Timeline						
<i>External Program Monitoring</i>	<i>Duration</i> <sup>++</sup>	<i>Start</i>	<i>Finish</i>	<i>Duration</i> <sup>++</sup>	<i>Effort</i>	<i>Variance</i>	<i>Start</i>	<i>Finish</i>	<i>% Complete</i>	<i>Comments</i>
<b>Estimated Timeline: 2024-2025</b>	<b>241</b>	<b>12/2/2024</b>	<b>11/3/2025</b>	<b>166</b>	<b>249</b>	<i>Duration</i>	<b>12/2/2024</b>		<b>92%</b>	
COSA - Child Care Services	46	12/2/2024	2/3/2025	81	80	35	12/2/2024	3/24/2025	100%	Completion delayed due to TWIST access issues.
COSA - CC QIA	40	1/27/2025	3/21/2025	40	40	0	2/11/2025	4/7/2025	100%	Start delayed due to TWIST access issues.
C2GPS - WIOA Adult	46	3/26/2025	5/28/2025	46	46	0	3/26/2025	5/28/2025	100%	
C2GPS - WIOA Dislocated Worker	46	3/26/2025	5/28/2025	46	46	0	3/26/2025	5/28/2025	100%	
C2GPS - SNAP										Moved SNAP to be completed internally by WSA QA
C2GPS - NCP	39	6/4/2025	7/28/2025	38	37	-1	5/29/2025	7/21/2025	100%	Working on the Final Report
SERCO - WIOA Youth	41	7/7/2025	9/1/2025				7/7/2025		49%	
C2GPS - TANF/Choices	40	9/3/2025	10/28/2025							
CONSORTIUM - Ready to Work	21	10/6/2025	11/3/2025							
Avg Duration or Effort (days) →	40			50	50	10				
Multi-tasking (% days overlapping projects) →	24.5%			-33.9%						

*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**

<sup>++</sup> 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, tool development, etc.).





## MEMORANDUM

**To:** Board of Directors  
**From:** Eric Vryn, Chief Process Officer  
**Date:** September 12, 2025  
**Subject:** Update on Enterprise Risk Assessment Tool

---

### Executive Summary

Workforce Solutions Alamo (WSA) has developed a comprehensive Enterprise Risk Management framework and web-based ERM tool to assess potential risks and vulnerabilities that could impact the agency's mission to serve the Alamo region. This initiative establishes systematic risk identification, assessment, and mitigation protocols that will enhance our stewardship of agency and public resources while supporting sustainable program delivery and participant outcomes.

### Strategic Context and Organizational Need

WSA operates in an increasingly complex environment characterized by sensitive participant data management, extensive vendor relationships, performance-linked funding mechanisms, and evolving regulatory requirements. Our analysis reveals that the agency currently lacks centralized risk management infrastructure, creating significant exposure that could compromise our ability to serve participants effectively and maintain public trust.

Current risk identification occurs reactively across departmental silos—primarily within QA, IT, and Procurement functions—often after incidents have materialized. This fragmented approach represents an unacceptable vulnerability for an organization managing federal and state workforce development investments while serving populations facing significant employment barriers.

The proposed ERM framework addresses this gap by creating a proactive, data-informed approach to risk management that aligns with evidence-based practices in public sector organizations and supports WSA's commitment to transparent accountability and operational excellence.

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## Framework Architecture and Methodology

### Risk Classification and Assessment Model

The framework employs a systematic approach built on thirteen (13) risk categories specifically designed for workforce development operations. These categories include: Risk Impact on Mission Delivery, Operational Disruption Potential, Risk Velocity/Time Sensitivity, Financial/Resource Exposure, Mitigation Cost Requirements, Regulatory/Compliance/Legal Impact, Stakeholder Impact Scope, Risk Ownership/Control Level, Executive Support for Mitigation, System/Infrastructure Risk, Fiscal Impact to Agency, Procurement Required, and Board Approval Required.

The risk evaluation process uses a weighted scoring model where each risk factor receives a score from 1-5, then multiplied by category-specific weights that reflect organizational priorities. This approach builds upon WSA's existing analytical capabilities and generates comprehensive risk scores that enable consistent assessment across departments.

The weighting structure prioritizes mission-critical factors. Regulatory compliance and mission delivery impact receive the highest weight (5), followed by financial considerations (4), operational factors (3), infrastructure and stakeholder elements (2), and implementation considerations (1). This hierarchy focuses assessment on organizational impact rather than procedural complexity.

WSA maintains a conservative risk approach with three severity levels:

- **Low Risk (below 55):** Higher tolerance with routine monitoring through standard quarterly review processes
- **Moderate Risk (55-110):** Managed tolerance requiring active monitoring and formal mitigation planning
- **High Risk (above 110):** Low tolerance demanding immediate attention with escalation and emergency response protocols

This structured approach supports our commitment to participant service delivery, regulatory compliance, and responsible stewardship of agency and public resources while enabling strategic program innovation. The scoring methodology ensures consistent application across all departments and risk categories.



## **Governance Structure and Accountability Framework**

The framework establishes clear ownership accountability through a three lines of defense model:

- **First Line:** Operational management (Directors and Managers) own and manage risks within their functional areas
- **Second Line:** Risk oversight and compliance monitoring (QA Division coordination of quarterly reviews)
- **Third Line:** Independent assurance (annual Texas Workforce Commission audits)

This structure ensures appropriate separation of duties while maintaining operational efficiency and supporting WSA's existing governance processes.

## **Implementation Strategy and Tool Development**

### **Tool Design and Functionality**

WSA's ERM tool is built on the Cognito Forms platform as a web-based application accessible to all staff members. The tool evaluates risks across thirteen (13) categories using a weighted scoring system that reflects organizational priorities for workforce development operations.

The web interface guides users through the risk assessment process step-by-step. The system calculates risk scores automatically and assigns risk classifications in real-time. The tool works on mobile devices and desktop computers.

Key features include automated scoring, immediate risk level determination, data export for reporting, and basic integration capabilities. The tool uses the established risk thresholds (below 55, 55-110, above 110) and allows documentation of mitigation strategies, risk ownership, and review schedules.

The Cognito Forms platform provides the necessary calculation capabilities and eliminates the need for spreadsheets while maintaining data accuracy for decision-making processes.

### **Integration with Existing Systems**

The ERM tool is designed to complement WSA's current operational processes. The weighted scoring methodology provides a systematic approach for risk assessment that can be understood and implemented by staff across different departments.

The thirteen (13) risk categories address factors specific to workforce development operations in Texas, including regulatory compliance requirements, stakeholder relationships, and system



infrastructure considerations. This focus reflects the operational environment where TWC oversight, federal funding compliance, and participant outcome requirements are organizational priorities.

## **Phased Implementation Timeline**

Implementation will follow a phased approach to ensure successful adoption across the organization. The initial phase will focus on framework introduction and staff training on the new risk assessment process. Subsequent phases will include full tool deployment and establishment of regular review cycles.

This measured approach enables careful monitoring and adjustment based on organizational feedback while ensuring sustainable adoption across all functional areas.

## **Expected Benefits and Return on Investment**

The ERM framework will generate value through several channels:

- **Enhanced Compliance and Audit Readiness:** Structured risk documentation and mitigation tracking will strengthen WSA's position in regulatory reviews and improve preparation for audits.
- **Operational Resilience:** Proactive risk identification will help prevent operational disruptions that could compromise participant services or program delivery, protecting program outcomes and funding streams.
- **Strategic Decision Support:** Risk-informed planning will improve resource allocation decisions and strategic initiatives, ensuring investments align with organizational priorities and risk tolerance.
- **Accountability and Transparency:** Clear risk ownership and regular reporting will strengthen internal controls and demonstrate responsible stewardship to funders, partners, and the communities we serve.

These benefits represent substantial value for a workforce development organization managing public investments and serving vulnerable populations, though specific financial impacts are difficult to quantify precisely.



## **Critical Success Factors and Risk Mitigation**

### **Implementation Dependencies**

Framework effectiveness depends on sustained engagement from departmental leadership and integration with existing governance processes. The QA Division will coordinate quarterly reviews to ensure consistent application and provide training support as needed.

### **Organizational Change Management**

Success requires cultural adaptation from informal to structured risk awareness. The intuitive web-based interface and guided assessment workflow address potential resistance while building competency gradually through user-friendly design and reduced training requirements.

### **Framework Limitations**

The current model provides foundational risk management capabilities with sophisticated analytical depth appropriate for workforce development operations. As organizational maturity develops, the framework can evolve to incorporate additional analytical capabilities and enhanced reporting through Power BI integration planned for FY26.

## **Alignment with Organizational Mission and Strategic Objectives**

The ERM initiative supports WSA's mission through:

- **Program Integrity:** Enhanced risk management helps protect program operations and ensures consistent service delivery.
- **Resource Stewardship:** Systematic risk oversight demonstrates responsible management of agency and public resources and supports sustainable operations.
- **Operational Improvement:** Proactive risk identification enables continuous improvement and adaptation to changing needs.
- **Stakeholder Confidence:** Strong risk management enhances WSA's credibility with funders, community partners, and other stakeholders.

## **Conclusion and Board Consideration**

The proposed ERM framework and tool represent an investment in WSA's operational foundation and long-term sustainability. By establishing systematic risk management capabilities through a



web-based ERM tool built on Cognito Forms, we strengthen our ability to fulfill our mission while demonstrating accountability expected of public workforce development organizations.

The ERM tool uses thirteen (13) risk categories with weighted scoring methodology to provide thorough assessment while maintaining accessibility through guided workflows and straightforward interface design. The tool will complement current operations while providing new risk management capabilities.

Implementation will proceed through a phased approach, with regular progress reports provided to ensure alignment with board expectations and organizational needs. The ERM tool's design prioritizes practical application and immediate value.

### **Board Action**

**Informational only**—no formal action requested at this time. Staff welcomes board input on framework priorities and implementation approach.

### **Fiscal Impact**

The fiscal impact is TBD and pending further analysis.

### **Attachments**

None



## MEMORANDUM

**To:** Board of Directors

**From:** Adrian Lopez, Chief Executive Officer

**Through:** Brandee Perez, Chief Financial Officer

**Presented By:** Kristen Rodriguez, Procurement and Contracts Management

**Date:** September 12, 2025

**Subject:** **Discussion and Possible Action: Contract Renewal Childcare Quality**

**Summary:** For discussion and potential action: The Workforce Solutions Alamo (WSA) - Board of Directors is presented with a proposed contract renewal budget and requesting authorization of initiation of contract negotiations with the City of San Antonio (COSA) for Child Care Quality (CCQ) Improvement Services in the Alamo region.

The estimated annual budget for these services is \$7,756,440, unless an authorized signed amendment by all parties.

In October 2024, A contract was executed for Child Care Quality (CCQ) Improvement Services in Alamo region, both urban and rural areas with the City of San Antonio. The initial term was twelve months with four (4) one-year renewal options. This contract renewal would exercise the first of four (4) one-year renewal options in the procurement cycle.

*This action aligns with Supporting Texas Talent and Economic Growth - Goal 2, Service Optimizers, in our strategic plan.*

**Analysis:** The scope of services includes implementing quality childcare activities as defined in 40 TAC §809.16 and related guidance, mentoring programs working toward or maintaining Texas Rising Star (TRS) certification and developing continuous quality improvement plans tailored to each provider’s needs. It also includes offering technical assistance to TRS and aspiring TRS providers, supporting professional development for childcare staff including attainment of CDA credentials or early childhood education degrees and providing incentives for achievement and

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retention. Additional components may include consumer education for parents, educational materials for children, parenting resources focused on early development, and other quality improvement initiatives permitted under CCDF regulations.

**Alternatives:** Any alternative to not approving the recommendation could lead to significant risks and challenges across various areas. This could include delays in starting the contract for the new fiscal year, difficulties in collaboration and information sharing, impacts on financial strategy and planning, challenges in maintaining accurate financial reporting and compliance, obstacles in effective risk management, and disruptions to strategic decision-making processes.

**Fiscal Impact:** The renewal term will be effective from October 1, 2025, through September 30, 2026, with the option for two additional 12-month renewal periods remaining, subject to mutual written agreement by both parties. The total annual expenditure under this agreement is estimated at \$7,756,440, unless modified by a formally executed amendment approved by all parties.

**Recommendation:** Procurement & Contracts Management recommends proceeding with contract negotiations and to approve the estimated contract budget with The City of San Antonio for the M Child Care Quality (CCQ) Improvement Services in the Alamo area for the period October 1, 2025, through September 30, 2026.

**Next Steps:** Upon approval of this action, WSA Procurement and Contract Management (PCM), in collaboration with the WSA Child Care Services Team, will issue a letter of Intent and begin contract negotiations for Child Care Quality (CCQ) Improvement Services.

**Attachments:** Fiscal Integrity



Workforce Board Area: Workforce Solutions Alamo
Contractor Name: City of San Antonio
Funding Source: Childcare
Contract Period: 10/1/25-9/30/26
Fiscal Integrity Review Date: 7/16/25
Prepared by: Christine H. Nguyen, CPA

Purpose:	To satisfy performance of the fiscal integrity evaluation of the contract that is being considered for renewal, or for a new contract to comply with the 40 TAC §802.21.			
Criteria:	Financial Manual for Grants and Contracts: Chapter 14, Supplement App D, P.3; TAC §802.21 requires Boards to perform fiscal integrity evaluations of workforce service providers.			
Procedures:	TWC FMGC Reference	Results (Yes / No / NA)	Source Documents Reviewed	Comments
<b>I. Fiscal Integrity Review</b>				
<b>A. Desk Review Procedures</b>				
1. Does the workforce service providers have the capacity or have program regulations to comply with the following requirements:				
(A) Federal and state statutes and regulations and directives of the Texas Workforce Commission.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit reports.	
(B) Any other safeguards a Board has identified that are designed to ensure the proper and effective use of funds placed under the control of its workforce service providers.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit reports.	
2. Review workforce service provider's prior three-year financial history before the Board awards or renews a workforce service contract.		Yes	Prior Financial Monitoring reports; Audit reports; and March 31, 2025 Financial Statements.	
3. Does workforce contractor have any adverse judgments or findings, such as administrative audit findings; Commission, Agency, or Board monitor findings; or sanctions by a Board or court of law?		No	Prior Financial Monitoring reports; Audit reports; and Inquiry.	
4. Does workforce contractor have provisions such as accounting for program income in accordance with federal regulations?		Yes	Prior Financial Monitoring reports; Recoupment	
5. Does workforce contractor have non-federal/state resources for repayment of disallowed costs in a timely manner?		Yes	Prior Financial Monitoring reports; Audit reports	
6. Does workforce contractor systems provide safeguarding of fixed assets and provide adequate internal controls for cash management, financial reporting, procurement, and cost allocation?		Yes	Prior Financial Monitoring reports; Accounting Policies and Procedures; Cost Allocation Plan.	
7. Does workforce contractor has adequate fidelity bonding, general liability, property, worker's compensation, and error and omission insurance coverage to protect workforce funds?	Chapter 14, App D., P.3	Yes	Certificate of Insurance.	
<b>B. Conclusion</b>				
1. Based on the above procedures, did the workforce contractor complies with the fiscal integrity requirements to administer workforce services		Yes		

We have reviewed and concurred with the external financial monitor's recommendation.

Gabriela Navarro Garcia  
 Certifying Signature

07/17/2025  
 Date



**MEMORANDUM**

**To:** Board of Directors

**From:** Adrian Lopez, CEO

**Presented By:** Kristen Rodriguez, Director Procurement and Contracts Management

**Date:** September 12, 2025

**Subject:** **Discussion and Possible Action: Contract Renewal M & O Adult Program Services**

---

**Summary:** For discussion and potential action: The Workforce Solutions Alamo – Board of Directors is presented with a proposed contract renewal budget and requesting authorization of initiation of contract negotiations with C2 Global Professional Services, Inc. for the Management and Operation Services for WSA’s Adult and American Job Centers in the Alamo Region.

The estimated annual budget for these services is \$13,800,000 unless an authorized signed amendment by all parties.

In October 2023, a contract was executed for the Management and Operation Services for Adult Program Services in the Alamo Region for both the Rural and Urban areas. The initial term was twelve months with four (4) one-year renewal options. This contract renewal would exercise the second of four (4) one-year renewal options in the procurement cycle.

*This action aligns with Supporting Texas Talent and Economic Growth - Goal 2, Service Optimizers, in our strategic plan.*

**Analysis:** WSA requires outsourcing of the Management and Operation Services - the Management and Operation Services of its Adult and American Job Centers across the Alamo Region. The scope of services includes full-scale management and operational oversight to ensure effective service delivery throughout the 13-county area. This includes maintaining adequate staffing levels, supporting program execution, and actively engaging in partnerships that strengthen community and industry collaboration. Outsourcing the management and operation services provides several

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benefits, including enhancing the relationship between people, programs, and industry. This fosters improved processes and program efficiency, encourages innovation, and promotes collaboration among stakeholders. The contractor is expected to devise and execute innovative strategies aligned with the Board's priorities, consistently meeting or exceeding performance metrics stipulated by the Texas Workforce Commission and other local Board standards.

**Alternatives:** Initiate a new solicitation for the procurement of Management and Operation Services for WSA's Adult and American Job Centers in the Alamo Region. However, issuing a new solicitation at this time could present several challenges and risks, such as:

- Delay on the commencement of services for the new fiscal year, impacting program timelines and deliverables.
- Difficulties in Collaboration and Information Sharing: Restarting the procurement process may disrupt existing partnerships and coordination efforts established during the previous solicitation.
- Obstacles in Effective Risk Management: Restarting the procurement process introduces uncertainties and potential risks that were previously mitigated under the existing solicitation framework.
- Disruptions to Strategic Decision-Making Processes: The need to issue a new solicitation can disrupt ongoing strategic planning and decision-making, impacting program continuity and long-term objectives.

Considering these factors, it's essential to weigh the benefits of starting afresh against the potential drawbacks and assess whether alternative solutions could mitigate these risks while achieving program objectives effectively.

**Fiscal Impact:** The renewal term will be effective from October 1, 2025, through September 30, 2026, with the option for two additional 12-month renewal periods remaining, subject to mutual written agreement by both parties. The total annual expenditure under this agreement is estimated at \$13,800,000, unless modified by a formally executed amendment approved by all parties.

**Recommendation:** To proceed with contract negotiations and to approve the estimated contract budget with C2 Global Professional Services, Inc. for the Management and Operation Services for WSA's Adult and American Job Centers, for the period October 1, 2025, through September 30, 2026.



**Next Steps:** With the approval of this action, WSA Procurement and Contract Management (PCM), in coordination with the WSA Programs Team, will issue a letter of intent and begin negotiations of the contract renewal with C2 Global Professional Services, Inc.

**Attachments:** Fiscal Integrity Review



Workforce Board Area: Workforce Solutions Alamo
Contractor Name: C2GPS
Funding Source: Workforce Services
Contract Period: 10/1/25-9/30/26
Fiscal Integrity Review Date: 7/16/25
Prepared by: Christine H. Nguyen, CPA

Purpose:	To satisfy performance of the fiscal integrity evaluation of the contract that is being considered for renewal, or for a new contract to comply with the 40 TAC §802.21.			
Criteria:	Financial Manual for Grants and Contracts: Chapter 14, Supplement App D, P.3; TAC §802.21 requires Boards to perform fiscal integrity evaluations of workforce service providers.			
Procedures:	TWC FMGC Reference	Results (Yes / No / NA)	Source Documents Reviewed	Comments
<b>I. Fiscal Integrity Review</b>				
<b>A. Desk Review Procedures</b>				
1. Does the workforce service providers have the capacity or have program regulations to comply with the following requirements:				
(A) Federal and state statutes and regulations and directives of the Texas Workforce Commission.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit report.	
(B) Any other safeguards a Board has identified that are designed to ensure the proper and effective use of funds placed under the control of its workforce service providers.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit report.	
2. Review workforce service provider's prior three-year financial history before the Board awards or renews a workforce service contract.		Yes	Prior Financial Monitoring reports; Audit report; Financial Statements-May 31, 2025; Tax	
3. Does workforce contractor have any adverse judgments or findings, such as administrative audit findings; Commission, Agency, or Board monitor findings; or sanctions by a Board or court of law?		No	Prior Financial Monitoring reports; Audit reports and Inquiry.	
4. Does workforce contractor have provisions such as accounting for program income in accordance with federal regulations?		Yes	Prior Financial Monitoring reports.	
5. Does workforce contractor have non-federal/state resources for repayment of disallowed costs in a timely manner?		Yes	Prior Financial Monitoring reports	
6. Does workforce contractor systems provide safeguarding of fixed assets and provide adequate internal controls for cash management, financial reporting, procurement, and cost allocation?		Yes	Prior Financial Monitoring reports; Accounting Policies and Procedures; Cost Allocation Plan; Current Financial Monitoring Review.	
7. Does workforce contractor has adequate fidelity bonding, general liability, property, worker's compensation, and error and omission insurance coverage to protect workforce funds?	Chapter 14, App D, P.3	Yes	Certificate of Insurance.	
<b>B. Conclusion</b>				
1. Based on the above procedures, did the workforce contractor complies with the fiscal integrity requirements to administer workforce services		Yes		

We have reviewed and concurred with the external financial monitor's recommendation.

*Gabriela Navarro Garcia*  
 \_\_\_\_\_  
 Certifying Signature

07/17/2025  
 \_\_\_\_\_  
 Date



**MEMORANDUM**

**To:** Board of Directors

**From:** Adrian Lopez, CEO

**Presented By:** Kristen Rodriguez, Director Procurement and Contracts

**Date:** September 12, 2025

**Subject:** **Discussion and Possible Action: Contract Renewal M & O Youth Program Services**

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**Summary:** For discussion and potential action, the Workforce Solutions Alamo Board of Directors to approve proposed contract budget and authorize the initiation of contract negotiations with SERCO of Texas, Inc. for the Management and Operation service for WSA’s Youth Services in the Alamo region.

The estimated annual budget for these services is \$3,800,000 unless an authorized signed amendment by all parties.

In October 2022, a contract was executed for the purchase of Management and Operation Services for Youth Services in the Alamo Region, both in Rural and urban areas. The initial term was twelve months, with three (3) one-year renewal options. This contract renewal would exercise the third of three (3) one-year renewal options in the procurement cycle.

**Analysis:** Workforce Solutions Alamo (WSA) is required to outsource the management and operational services for youth programs in the Alamo Region, specifically for the WIOA Youth Program. The scope of services encompasses the full management and operation to promote youth development and citizenship, such as leadership development through voluntary community service opportunities, adult mentoring, work experience, and enrollment in post-secondary education and employment. The contractor will be expected to develop and implement innovative strategies that align with the board's priorities and consistently achieve or surpass contracted performance measures set by the Texas Workforce Commission and other local board measures.

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**Alternatives:** Initiate a new solicitation for the procurement of Management and Operation Services for Youth Services in the Alamo Region. However, issuing a new solicitation at this time could present several challenges and risks, such as:

- Delays in contract start since issuing a new solicitation could delay the commencement of services for the new fiscal year, impacting program timelines and deliverables.
- Difficulties in Collaboration and Information Sharing: Restarting the procurement process may disrupt existing partnerships and coordination efforts established during the previous solicitation.
- Obstacles in Effective Risk Management: Restarting the procurement process introduces uncertainties and potential risks that were previously mitigated under the existing solicitation framework.
- Disruptions to Strategic Decision-Making Processes: The need to issue a new solicitation can disrupt ongoing strategic planning and decision-making, impacting program continuity and long-term objectives.

Considering these factors, it's essential to weigh the benefits of starting afresh against the potential drawbacks and assess whether alternative solutions could mitigate these risks while achieving program objectives effectively.

**Fiscal Impact:** The renewal term will be effective from October 1, 2025, through September 30, 2026, with the option for two additional 12-month renewal periods remaining, subject to mutual written agreement by both parties. The total annual expenditure under this agreement is estimated at \$3,800,000, unless modified by a formally executed amendment approved by all parties. The final contract amount will be determined by the final budget provided by the Texas Workforce Commission (TWC), as the current estimated budget is based on the prior fiscal year's allocation.

**Recommendation:** To proceed with contract negotiations and to approve the estimated contract budget with SERCO of Texas, Inc for the Management and Operation Services for WSA's Youth Services, October 1, 2025, through September 30, 2026.

SERCO of Texas, Inc has consistently fulfilled expectations in the management of youth services and has demonstrated a strong ability to meet or surpass contracted performance goals. The organization has reliably responded to service delivery needs while exhibiting outstanding flexibility in supporting the Board's initiatives and strategic objectives.



**Next Steps:** With the approval of this action, WSA Procurement and Contract Management (PCM), in coordination with the WSA Programs Team, will negotiate the contract renewal with SERCO of Texas, Inc.

**Attachments:** Fiscal Integrity Review.



Workforce Board Area: Workforce Solutions Alamo
Contractor Name: SERCO of Texas
Funding Source: WIOA - Youth
Contract Period: 10/1/25-9/30/26
Fiscal Integrity Review Date: 7/16/25
Prepared by: Christine H. Nguyen, CPA

Purpose:	To satisfy performance of the fiscal integrity evaluation of the contract that is being considered for renewal, or for a new contract to comply with the 40 TAC §802.21.
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Criteria:	Financial Manual for Grants and Contracts: Chapter 14, Supplement App D, P.3; TAC §802.21 requires Boards to perform fiscal integrity evaluations of workforce service providers.
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Procedures:	TWC FMGC Reference	Results (Yes / No / NA)	Source Documents Reviewed	Comments
<b>I. Fiscal Integrity Review</b>				
<b>A. Desk Review Procedures</b>				
1. Does the workforce service providers have the capacity or have program regulations to comply with the following requirements:				
(A) Federal and state statutes and regulations and directives of the Texas Workforce Commission.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit reports.	
(B) Any other safeguards a Board has identified that are designed to ensure the proper and effective use of funds placed under the control of its workforce service providers.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit reports.	
2. Review workforce service provider's prior three-year financial history before the Board awards or renews a workforce service contract.		Yes	Prior Financial Monitoring reports; Audit reports; and May 31, 2025 Financial	
3. Does workforce contractor have any adverse judgments or findings, such as administrative audit findings; Commission, Agency, or Board monitor findings; or sanctions by a Board or court of law?		No	Prior Financial Monitoring reports; Audit reports; and Inquiry.	
4. Does workforce contractor have provisions such as accounting for program income in accordance with federal regulations?		Yes	Prior Financial Monitoring reports.	
5. Does workforce contractor have non-federal/state resources for repayment of disallowed costs in a timely manner?		Yes	Prior Financial Monitoring reports; Audit reports	
6. Does workforce contractor systems provide safeguarding of fixed assets and provide adequate internal controls for cash management, financial reporting, procurement, and cost allocation?		Yes	Prior Financial Monitoring reports; Accounting Policies and Procedures; Cost Allocation Plan; and Current Financial Monitoring Review.	
7. Does workforce contractor has adequate fidelity bonding, general liability, property, worker's compensation, and error and omission insurance coverage to protect workforce funds?	Chapter 14, App D., P.3	Yes	Certificate of Insurance.	
<b>B. Conclusion</b>				
1. Based on the above procedures, did the workforce contractor complies with the fiscal integrity requirements to administer workforce services		Yes		

We have reviewed and concurred with the external financial monitor's recommendation.

*Gabriela Navarro Garcia*  
 \_\_\_\_\_  
 Certifying Signature

07/17/2025  
 \_\_\_\_\_  
 Date



## MEMORANDUM

**To:** Board of Directors

**From:** Adrian Lopez, Chief Executive Officer

**Through:** Brandee Perez, Chief Financial Officer

**Presented By:** Kristen Rodriguez, Director of Procurement and Contracts Management

**Date:** September 12, 2025

**Subject:** Discussion and Possible Action: Contract for Work Readiness Training Services

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**Summary:** For discussion and potential action: The Workforce Solutions Alamo (WSA) - Board of Directors is presented with a proposal to award a contract to Nextgen People, the highest rank offeror, for the purchase of Work Readiness Training Services in the estimated aggregate amount of \$240,000 unless an authorized signed amendment by all parties. The contract term will be effective October 1, 2025, through September 30, 2026, with the option to renew for up to two (2) one-year periods upon written mutual consent of Workforce Solutions Alamo and the selected Contractor.

This action aligns with Supporting Texas Talent and Economic Growth - Goal 2, Service Optimizers, in our strategic plan.

**Analysis:** The Contractor will provide comprehensive services to be designing and implementing a comprehensive Work Readiness Training curriculum. The Provider must demonstrate the appropriate knowledge, skills, and abilities related to instructional techniques, working effectively with youth and adults, and employing methods that appropriately support individuals with disabilities.

The Work Readiness Training will be structured to help participants:

- Develop essential work skills.
- Build self-confidence.
- Network with peers and professionals.

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- Receive constructive guidance and performance feedback; and
- Explore various career pathways.

The curriculum must align with industry standards and the needs of our target clients. It should include, but not be limited to, the following instructional modules:

- Work Readiness Introduction.
- Employer Expectations.
- Time Management.
- Communication and Teamwork.
- Decision-Making and Problem-Solving.
- Skills to Succeed.

A Request for Proposals (RFP) notice was published online and, in the Texas, Electronic State Business Daily (ESBD) on April 10, 2025. Procurement and Contracts sent an email inviting potential respondents to participate in the RFP, also posted on its eBid portal, Bonfire. WSA received thirty-two (32) proposals by May 21, 2025, the deadline, and these proposals underwent evaluation by internal assessors in accordance with the RFP's specifications and requirements. Six (6) were eliminated for non-responsive.

**Alternatives:** Any alternative to not approving the recommendation could lead to significant risks and challenges across various areas. This could delay in providing participants with needed training, negatively impacting program timelines, employer partnerships, and participant outcomes.

**Fiscal Impact:** The contract will initially span one (1) year effective from October 1, 2025, to September 30, 2026, with two (2) subsequent 12-month renewal periods possible upon mutual written consent of both parties. The estimated aggregate amount of \$240,000, unless an authorized signed amendment by all parties.

**Recommendation:** Procurement & Contracts Management recommends proceeding with the evaluators' recommendation to award the contract to Nextgen People, the highest-ranked contractor, for Work Readiness Training Services in the Alamo Workforce Development Area.



**Next Steps:** Upon approval of this action, WSA Procurement and Contract Management (PCM), in collaboration with the WSA Program Services Team, will initiate negotiations and facilitate the execution of contract for Nextgen People, for Work Readiness Training Services.

**Attachments:** RFP 2025-014 Proposal Tabulation

	Total	A - Quality of Applicant Goods and Services	B - Goods or Services meets the Agency's Needs	C - Price	C-1 - Complete Attachment B
Supplier	/ 100 pts	/ 30 pts	/ 45 pts	/ 20 pts	/ 20 pts
Nextgen People	84.96	29.5	43	12.46	12.46 (\$13,156.50)
Dynamic Workforce Solutions LLC (DWI)	84	27	37	20	20 (\$8,193.50)
Transformation7, LLC	76.17	24.5	37	9.668	9.668 (\$16,950.00)
The Executive Learning Lab	75.36	26	40	9.364	9.364 (\$17,500.00)
Workforce Consulting	71.84	24.5	30	17.34	17.34 (\$9,450.00)
Phase Consulting Partners	69.55	25	35	9.546	9.546 (\$17,166.50)



Partners In Progress	68.36	26	39	3.361	3.361 (\$48,750.00)
KAS Consulting Group	63.92	23	30	10.92	10.92 (\$15,000.00)
At the Heart of Teaching, Learning, & Leadership (210) 464-6485	62.91	25.5	37	0.4062	0.4062 (\$403,425.00)
Bottson Services LLC	61.81	21	19	16.81	16.81 (\$9,750.00)
The Kyra Company, LLC	59.65	24.5	35	0.15435	0.15435 (\$1,061,666.00)
Orbis Novitas Solutions, Inc	56.65	22.5	34	0.14628	0.14628 (\$1,120,213.00)
Zeitgeist Wellness Group	56.21	11.5	28	11.71	11.71 (\$14,000.00)
Dr J Enterprises LLC	55.47	22.5	28	4.967	4.967 (\$32,990.00)



Titan Finance LLC	55.37	21	30	4.37	4.37 (\$37,500.00)
Business Operational Support Services, LLC	52.2	19	28	5.202	5.202 (\$31,500.00)
Parachute RGV LLC	51.44	21	25	0.4367	0.4367 (\$375,250.00)
Bunifu LLC - Learning for Life	51.39	18.5	28	4.894	4.894 (\$33,481.50)
ProCert Training LLC	50.37	17.5	21	11.87	11.87 (\$13,800.00)
Spellman Consulting Group, LLC	49.38	17.5	26	5.88	5.88 (\$27,870.00)
Auclare Vision	49.04	16.5	32	0.54169	0.54169 (\$302,517.00)
Prolific Success Events & Consulting	48.99	14	21	13.99	13.99 (\$11,710.00)



The Write Direction	47.75	17.5	27	3.246	3.246 (\$50,490.00)
KenCove Partners	44.71	16.5	27	1.214	1.214 (\$135,000.00)
Urbanetectonics, LLC	43.52	17.5	25	1.024	1.024 (\$160,000.00)
UnBoxed Solutions	38.6	14	23	1.599	1.599 (\$102,490.00)



**MEMORANDUM**

**To:** Board of Directors  
**From:** Brandee Perez, Chief Financial Officer  
**Presented by:** Gabriela Navarro Garcia, Controller  
**Date:** September 12, 2025  
**Regarding:** Financial Report

**SUMMARY:** Financial reports through June 30, 2025, have been prepared for the fiscal year October 1, 2024, through September 30, 2025; the straight-line expenditure benchmark is 75% of the budget. The board regularly analyzes Corporate and Facility Budgets in addition to the Grant Summary Report to monitor budgets against actual expenditures.

**CORPORATE BUDGET:**

Expenditures	% Expensed	Comments
Personnel	65.07%	This is an acceptable variance. Staff have attended ongoing training and conferences to provide quality services within the organization.
Board Facility	80.94%	The WSA Board facility budget is acceptable and within the budget.
Equipment	65.58%	Cloud-based infrastructure expenses will continue to reflect in the following months.
General Office Expense	45.27%	The primary budget surplus is due to the insurance contingency.
Professional Services	50.47%	This variance consists in a timing difference in monitoring expenditures. Legal and professional services related to temporary staffing are utilized as needed to support the agency.
Board Training & Development	41.09%	The board does not have any upcoming board conferences but will continue to track any available conferences that would benefit the board in the current fiscal year
<b>Total Expense</b>	<b>61.43%</b>	

Corporate expenditure represents 6.59% of overall expenditures, and demonstrating a budget surplus of approximately 13.57% through June 2025.

**FACILITIES AND INFRASTRUCTURE BUDGET:**

<b>Expenditures</b>	<b>% Expensed</b>	<b>Comments</b>
Overall	71.06%	The facility expenditures represent 3.05% of the overall expenditures and reflecting a 3.94% straight-line budget surplus. This is an acceptable variance.

**ACTIVE GRANTS ONLY (TWC):**

<b>Grant</b>	<b>End date</b>	<b>Budget</b>	<b>% Expense</b>	<b>Comments</b>
25TAF Temporary Assistance for Needy Families	10/31/2025	\$6,590,722	59.81%	The board continues to closely monitor expenditures to spent all funds by the end of the contract period.
24WOR Rapid Response	06/30/2025	\$58,320	100%	Grant has been fully spent as of 06/30/2025 and the board has received new grant of \$51,557 for a 12-month period.
25TRA Trade Act	09/30/2025	\$5,000	100%	The board has fully spent as of 06/30/2025 and may expect to receive a new grant by 10/01/2025.
25WPA Wagner-Peyser Employment Services	12/31/2025	\$523,317	84.73%	The board received an additional \$143,920 in July to support through the end of the grant period.
25CCP – Texas Dept Family Protective Services	12/31/2025	\$8,004,189	85.27%	The board received additional funds in August to support childcare funds needed for the contract period.
25CCQ – Child Care Quality	10/31/2025	\$4,412,859	39.17%	The board expects higher expenditures in the coming months with the purchase of supplies and materials for quality TRS providers. The board would continue to monitor projections to fully spend the grant.
25CQF – CCDF Quality Improvement Activity	10/31/2025	\$4,069,145	45.51%	The board expects expenditures up to 80% of the funds going to incentives and 20% got quality supplies and materials for quality TRS providers. The board would continue to monitor projections to fully spend the grant.

25REA- Reemployment Services	09/30/2025	\$1,446,281	42.91%	The board received an additional \$528,000 into the grant. The board will continue to monitor expenditures to spend all funds by the end of the contract period.
24MTC – Military to Civilian Employment Program	04/30/2026	\$225,085	.01%	New grant awarded April 21, 2025, for a 12-month period. Expenditures are expected to be reflected in the next months.
25VR1 - SEAL	09/30/2025	\$900,000	13.06%	TWC has reduced the targets from 256 to 128, which reduces the expected utilization of the dollars. This grant will reflect higher expenditures in the next 2 months.
24PWE – Paid Work Experience	9/30/2025	\$187,500	0%	Referrals have not been received by VR. The board is looking in to opportunities to spend the funds.

**ACTIVE GRANTS ONLY (NON-TWC):**

Grant	End date	Budget	% Expense	Comments
DOL Building Pathways	09/30/2029	\$2,000,000	1.85%	New grant received for a 4-year period. Expenditures will start increasing in the coming months.
22RTW	05/31/2025	\$65,554,565	56.32%	Expenditures will continue to be realized in the following months as outstanding invoices come in for training started in the contract period.
25RTW	05/31/2026	\$11,114,758	3.75%	Expenditures will be reflected in the coming months as subrecipient contracts are finalized and outstanding invoices come in for training started in the contract period.

**ATTACHMENTS:**

Financial Statements – June 30, 2025



**MEMORANDUM**

**To:** Board of Directors  
**From:** Brandee Perez, Chief Financial Officer  
**Presented By:** Gabriela Navarro Garcia, Controller  
**Date:** September 12, 2025  
**Subject:** Childcare System Updates

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

**Summary:** The Texas Workforce Solutions (TWC) launched TX Child Care Connection (TX3C) software in January 2025. Since the launch the staff have been working through many challenges such as payments to providers, reporting and program requirements.

TWC meets twice a week with the Boards to discuss concerns with reporting, provider and contractor feedback, status updates to the software and payments. While these meetings are beneficial there continues to be limited progress on system updates which has led to manual processes being implemented.

**Fiscal Impact:** TWC continues to track the issues and potential fixes that have been identified by the Board (table below).

Issues/Fixes - Outstanding	
Description	Status
Unit issues on 245 (incorrect number of units displaying on 245 related to adjustments) –New report	KinderSystems is proposing a new report that with units adjusted. Report mock-up provided to TWC 4/17/2025 was incomplete. TWC working with KinderSystems to firm and finalize requirements.

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<p>(240) in to address this issue and address performance management needs performance management needs</p>	<p>The KS Product team continues to work on the report design. TWC is reviewing report design and mock-up and soliciting input from Board users before finalizing. Scheduled for 4.31 release 7/25/2025.</p>
<p>Waiting List enhancements:</p> <ul style="list-style-type: none"> <li>• Ability to edit priority groups</li> </ul> <p>Ability to view/report at child-level</p>	<p>Deployment date TBD.</p> <p>The meeting was held 3/25 to refine design. KinderSystems completing design for TWC review/approval.</p> <p>KinderSystems provided feature design documents for TWC approval 4/14/2025. CC&amp;EL identified missing requirements. Targeted deployment date pending revised/approved design. This issue has been escalated as critical.</p> <p>Additional requirements for refinement held 5/6/2025 and 5/14. KinderSystems is finalizing the design documents for TWC review. Fix to be scheduled.</p>
<p>Missing homeless priority (did not convert as a priority category from TWIST)</p>	<p>KinderSystems will complete a data fix to update applications. TWC initial review of data fix failed validation. TWC provided additional guidance to KinderSystems on TWIST homelessness data on 4/11/2025.</p> <p>Data to be corrected has passed validation. Upon implementation of the data fix, then the entire waiting list will be reprioritized by the system; KS to implement the fix first in the Staging environment for TWC review prior to implementing in Production.</p> <p>CC&amp;EL provided provide KS with a list of Boards/cases to exclude from adding back the priority on 5/9/2025. KS</p>



	<p>reviewing week of 5/12/2025 and will advise TWC if there are any concerns, particularly with the 6 Boards that have requested targeted/case-level data interventions.</p> <p>KS will apply the fix in the STG environment for TWC review prior to applying in production.</p>
<p>“Spring Break” payment issue when shortening a schedule – Paid both providers for the same time frame (should have adjusted to take shortened schedule days out).</p>	<p>Root cause identified. KS to change provider transfer logic to handle auto adjustments for these scenarios. Scheduled for 4.31 release on 7/25/2025.</p> <p>NOTE: For a temporary workaround, Boards can go into each child and adjust schedules versus using the “transfer” feature.</p>
<p>Accessibility/JAWS reader compatibility issues</p>	<p>Some KinderTrack features are not accessible for screen readers such as JAWS (Alamo report). TWC is working with KinderSystems to prioritize fixes in an upcoming release. Tentatively scheduled for the 4.33 release.</p>
<p>NEW: Incorrect service month on 245 Report</p>	<p>Missing service month was added in release 4.30, but partially failed validation due to incorrect service months appearing. Fix scheduled for 4.33 release.</p>

**Next Steps:** Staff will continue to attend the TWC meetings to receive updates and communicate ongoing challenges. In addition, staff will closely monitor the potential delays in funding and notify all impacted parties.



## MEMORANDUM

To: Board of Directors  
From: Adrian Lopez, Chief Executive Officer  
Through: Brandee Perez, Chief Financial Officer  
Presented by: Gabriela Navarro Garcia, Controller  
Date: September 12, 2025  
Regarding: **Fiscal Integrity Reports**

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**SUMMARY:** *Update and Possible Discussion on Fiscal Integrity Reviews for Subrecipients.* The Texas Workforce Commission's Financial Manual for Grants and Contracts (FMGC) requires boards to complete an annual fiscal integrity review before executing a contract renewal. The reviews are conducted by Christine Nguyen, CPA.

**ANALYSIS:** The Fiscal Integrity reports for C2 GPS, COSA and SERCO have been completed. All contractors comply with the fiscal integrity requirements to administer workforce services.

**FISCAL IMPACT:** The board has reviewed and concurred with the external financial monitor's recommendations.

**ATTACHMENTS:**

Fiscal Integrity Report for C2GPS  
Fiscal Integrity Report for SERCO  
Fiscal Integrity Report for COSA

<b>Workforce Board Area: Workforce Solutions Alamo</b>
<b>Contractor Name: C2GPS</b>
<b>Funding Source: Workforce Services</b>
<b>Contract Period: 10/1/25-9/30/26</b>
<b>Fiscal Integrity Review Date: 7/16/25</b>
<b>Prepared by: Christine H. Nguyen, CPA</b>

<b>Purpose:</b>	To satisfy performance of the fiscal integrity evaluation of the contract that is being considered for renewal, or for a new contract to comply with the 40 TAC §802.21.			
<b>Criteria:</b>	Financial Manual for Grants and Contracts: Chapter 14, Supplement App D, P.3; TAC §802.21 requires Boards to perform fiscal integrity evaluations of workforce service providers.			
<b>Procedures:</b>	<b>TWC FMGC Reference</b>	<b>Results (Yes / No / NA)</b>	<b>Source Documents Reviewed</b>	<b>Comments</b>
<b>I. Fiscal Integrity Review</b>				
<b>A. Desk Review Procedures</b>				
1. Does the workforce service providers have the capacity or have program regulations to comply with the following requirements:				
(A) Federal and state statutes and regulations and directives of the Texas Workforce Commission.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit report.	
(B) Any other safeguards a Board has identified that are designed to ensure the proper and effective use of funds placed under the control of its workforce service providers.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit report.	
2. Review workforce service provider's prior three-year financial history before the Board awards or renews a workforce service contract.		Yes	Prior Financial Monitoring reports; Audit report; Financial Statements-May 31, 2025; Tax	
3. Does workforce contractor have any adverse judgments or findings, such as administrative audit findings; Commission, Agency, or Board monitor findings; or sanctions by a Board or court of law?		No	Prior Financial Monitoring reports; Audit reports and Inquiry.	
4. Does workforce contractor have provisions such as accounting for program income in accordance with federal regulations?		Yes	Prior Financial Monitoring reports.	
5. Does workforce contractor have non-federal/state resources for repayment of disallowed costs in a timely manner?		Yes	Prior Financial Monitoring reports	
6. Does workforce contractor systems provide safeguarding of fixed assets and provide adequate internal controls for cash management, financial reporting, procurement, and cost allocation?		Yes	Prior Financial Monitoring reports; Accounting Policies and Procedures; Cost Allocation Plan; Current Financial Monitoring Review.	
7. Does workforce contractor has adequate fidelity bonding, general liability, property, worker's compensation, and error and omission insurance coverage to protect workforce funds?	Chapter 14, App D, P.3	Yes	Certificate of Insurance.	
<b>B. Conclusion</b>				
1. Based on the above procedures, did the workforce contractor complies with the fiscal integrity requirements to administer workforce services		Yes		

We have reviewed and concurred with the external financial monitor's recommendation.

*Gabriela Navarro Garcia*  
 \_\_\_\_\_  
 Certifying Signature

07/17/2025  
 \_\_\_\_\_  
 Date

<b>Workforce Board Area: Workforce Solutions Alamo</b>
<b>Contractor Name: City of San Antonio</b>
<b>Funding Source: Childcare</b>
<b>Contract Period: 10/1/25-9/30/26</b>
<b>Fiscal Integrity Review Date: 7/16/25</b>
<b>Prepared by: Christine H. Nguyen, CPA</b>

<b>Purpose:</b>	To satisfy performance of the fiscal integrity evaluation of the contract that is being considered for renewal, or for a new contract to comply with the 40 TAC §802.21.
<b>Criteria:</b>	Financial Manual for Grants and Contracts: Chapter 14, Supplement App D, P.3; TAC §802.21 requires Boards to perform fiscal integrity evaluations of workforce service providers.

<b>Procedures:</b>	<b>TWC FMGC Reference</b>	<b>Results (Yes / No / NA)</b>	<b>Source Documents Reviewed</b>	<b>Comments</b>
<b>I. Fiscal Integrity Review</b>				
<b>A. Desk Review Procedures</b>				
1. Does the workforce service providers have the capacity or have program regulations to comply with the following requirements:				
(A) Federal and state statutes and regulations and directives of the Texas Workforce Commission.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit reports.	
(B) Any other safeguards a Board has identified that are designed to ensure the proper and effective use of funds placed under the control of its workforce service providers.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit reports.	
2. Review workforce service provider's prior three-year financial history before the Board awards or renews a workforce service contract.		Yes	Prior Financial Monitoring reports; Audit reports; and March 31, 2025 Financial Statements.	
3. Does workforce contractor have any adverse judgments or findings, such as administrative audit findings; Commission, Agency, or Board monitor findings; or sanctions by a Board or court of law?		No	Prior Financial Monitoring reports; Audit reports; and Inquiry.	
4. Does workforce contractor have provisions such as accounting for program income in accordance with federal regulations?		Yes	Prior Financial Monitoring reports; Recoupment	
5. Does workforce contractor have non-federal/state resources for repayment of disallowed costs in a timely manner?		Yes	Prior Financial Monitoring reports; Audit reports	
6. Does workforce contractor systems provide safeguarding of fixed assets and provide adequate internal controls for cash management, financial reporting, procurement, and cost allocation?		Yes	Prior Financial Monitoring reports; Accounting Policies and Procedures; Cost Allocation Plan.	
7. Does workforce contractor has adequate fidelity bonding, general liability, property, worker's compensation, and error and omission insurance coverage to protect workforce funds?	Chapter 14, App D., P.3	Yes	Certificate of Insurance.	
<b>B. Conclusion</b>				
1. Based on the above procedures, did the workforce contractor complies with the fiscal integrity requirements to administer workforce services		Yes		

We have reviewed and concurred with the external financial monitor's recommendation.

*Gabriela Navarro Garcia*  
 Certifying Signature

07/17/2025  
 Date

<b>Workforce Board Area: Workforce Solutions Alamo</b>
<b>Contractor Name: SERCO of Texas</b>
<b>Funding Source: WIOA - Youth</b>
<b>Contract Period: 10/1/25-9/30/26</b>
<b>Fiscal Integrity Review Date: 7/16/25</b>
<b>Prepared by: Christine H. Nguyen, CPA</b>

<b>Purpose:</b>	To satisfy performance of the fiscal integrity evaluation of the contract that is being considered for renewal, or for a new contract to comply with the 40 TAC §802.21.
<b>Criteria:</b>	Financial Manual for Grants and Contracts: Chapter 14, Supplement App D, P.3; TAC §802.21 requires Boards to perform fiscal integrity evaluations of workforce service providers.

<b>Procedures:</b>	<b>TWC FMGC Reference</b>	<b>Results (Yes / No / NA)</b>	<b>Source Documents Reviewed</b>	<b>Comments</b>
<b>I. Fiscal Integrity Review</b>				
<b>A. Desk Review Procedures</b>				
1. Does the workforce service providers have the capacity or have program regulations to comply with the following requirements:				
(A) Federal and state statutes and regulations and directives of the Texas Workforce Commission.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit reports.	
(B) Any other safeguards a Board has identified that are designed to ensure the proper and effective use of funds placed under the control of its workforce service providers.		Yes	Prior Financial Monitoring reviews; Accounting Policies and Procedures, Audit reports.	
2. Review workforce service provider's prior three-year financial history before the Board awards or renews a workforce service contract.		Yes	Prior Financial Monitoring reports; Audit reports; and May 31, 2025 Financial	
3. Does workforce contractor have any adverse judgments or findings, such as administrative audit findings; Commission, Agency, or Board monitor findings; or sanctions by a Board or court of law?		No	Prior Financial Monitoring reports; Audit reports; and Inquiry.	
4. Does workforce contractor have provisions such as accounting for program income in accordance with federal regulations?		Yes	Prior Financial Monitoring reports.	
5. Does workforce contractor have non-federal/state resources for repayment of disallowed costs in a timely manner?		Yes	Prior Financial Monitoring reports; Audit reports	
6. Does workforce contractor systems provide safeguarding of fixed assets and provide adequate internal controls for cash management, financial reporting, procurement, and cost allocation?		Yes	Prior Financial Monitoring reports; Accounting Policies and Procedures; Cost Allocation Plan; and Current Financial Monitoring Review.	
7. Does workforce contractor has adequate fidelity bonding, general liability, property, worker's compensation, and error and omission insurance coverage to protect workforce funds?	Chapter 14, App D., P.3	Yes	Certificate of Insurance.	
<b>B. Conclusion</b>				
1. Based on the above procedures, did the workforce contractor complies with the fiscal integrity requirements to administer workforce services		Yes		

We have reviewed and concurred with the external financial monitor's recommendation.

*Gabriela Navarro Garcia*  
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 Certifying Signature

07/17/2025  
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 Date