



MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented By: Teresa Chavez, Chief Operating Officer

Date: November 20, 2025

Subject: **Child Care Services Transition**

Summary: This memo provides an overview of the Child Care Services Transition from The City of San Antonio to Equus Workforce Solutions. Workforce Solutions Alamo Board staff worked with both contractors to ensure smooth transition of staff and resources.

Analysis: Contractor staff were given opportunities to meet Equus Workforce Solutions staff during Townhall Meetings. Those who decided not to apply with Equus were also given the opportunity to attend a job fair held at the Datapoint location. Overall, 48 staff transitioned from The City of San Antonio to Equus Workforce Solutions.

Status	Count	Total
Retired	7	26
Not Selected	7	
Did Not Apply	5	
Other Employment - Prior to Transition	3	
Education	2	
Stayed with COSA	1	
Relocated	1	
Transitioned	48	61
New Hire	12	
Equus Staff	1	
Grand Total	87	87



During the first few weeks of October, Equus Workforce Solutions has been conducting training, with a track for both new staff and those tenured staff who only required a refresher.

Alternatives: N/A

Fiscal Impact: The fiscal impact of the Child Care Services Transition included a budget to cover work occurring during September. Funding was moved from the Transition budget to the Contract budget to account for training that occurred beginning October 1, 2025.

Recommendation: N/A

Next Steps: Workforce Solutions Alamo Board staff will continue to support Equus Workforce Solutions as they continue to create innovative changes to the child care scholarship delivery system.



MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented By: Kimberly Gomez, Child Care Quality Manager

Date: November 20, 2025

Subject: Texas Rising Star Update: Waivers

Summary:

The Texas Rising Star (TRS) program, a Quality Rating and Improvement System (QRIS) administered in conjunction with the Texas Workforce Commission's (TWC) Child Care Services (CCS) program, recognizes and supports high-quality early childhood education programs. TRS certification is available to licensed child care centers, licensed child care homes, and registered child care home facilities that meet established criteria. The program offers three distinct levels of quality certification—Two-Star, Three-Star, and Four-Star—designed to incentive continuous quality improvement. These tiered certifications correlate with enhanced reimbursement rates for providers serving children receiving child care scholarships. Extensive research demonstrates a strong correlation between attendance in high-quality early learning programs and enhanced school readiness. TRS-certified programs, which demonstrably exceed the minimum standards set forth by the Texas Health and Human Services Commission (HHSC) Child Care Regulation (CCR), are positioned to significantly contribute to the positive physical, social-emotional, and cognitive development of children. As programs progress through the TRS levels, their positive impact on children's development is amplified.

Analysis:

The Alamo region currently benefits from the expertise of 18 mentors who actively support participating centers. As of October 1, 2025, the Alamo region boasts 447 TRS-certified Early Learning Programs. This cohort comprises 239 Four-Star, 149 Three-Star, and 59 Two-Star



programs. TRS-certified programs represent 75% of all CCS programs within the Alamo region. TRS mentors and boards maintain consistent engagement with the Centralizing Assessment Entity to ensure a shared understanding of roles and responsibilities related to assessments.

The number of providers with active scholarship agreements continues to fluctuate. As of October 1, 2025, 593 centers hold such agreements, encompassing Licensed Centers, Licensed Child Care Homes, Military facilities, and Registered Child Care Homes. Notably, Relative Care Listed Homes are excluded from TRS program counts and percentages.

Key data points as of October 1, 2025, are presented below:

Texas Rising Star	Entry Level	Suspension	Total
447	132	14	593
75%	23%	2%	100%

Alternatives: Waivers, WSA submitted 36 waivers for approval to Texas Workforce Commission; those submitted for approval have received an approved waiver. Four providers did not submit their certification by the 9/30/2025 deadline and the process to end their CCS agreement has been initiated.

As a reminder the criteria for receiving a waiver is the following as outlined by the Texas Rising Star Guidelines:

To be eligible for an Entry Level extension waiver the child care and early learning program must be:

- located in a child care desert (an area where the number of children younger than six years of age who have working parents is at least three times greater than the capacity of licensed



child care programs in the area); or serving an underserved population* as determined by TWC;

- Unable to meet the certification requirements due to a declared emergency/disaster; or
- Unable to meet the certification requirements due to conditions that are outside the child care program's control.

Fiscal Impact: N/A

Recommendation: N/A

Next Steps: The Workforce Solutions Alamo (WSA) will continue to monitor assessment preparation and program application submissions. The Centralizing Assessment Entity manages assessments and scheduling, adhering to TWC guidance and processes.



MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented By: Teresa Chavez, Chief Operating Officer

Date: November 20, 2025

Subject: **Alamo Quality Pathway Conference**

Summary: This item to provide an update on the Alamo Quality Pathway Conference and the feedback collected from attendees regarding the utilization of the Workforce One Bus.

Analysis: The 2nd annual Alamo Quality Pathway Conference: Ignite the Wonder, was held on September 20th, 2025, at ESC Region 20. Thought he collaborative efforts from ESC Region 20, United Way of San Antonio and Bexar County and Workforce Solutions Alamo. The event provided in person professional development opportunities for attendees; the conference was intended for both Directors and Teachers. Sessions covered topics in business, language development, challenging behaviors, staff retention, learning through play, assessments, child development, employee absenteeism and more. There were 144 attendees at the event, this is about 63% of the 227 that registered for the event. Additionally, vendors were present at the event that provided information and door prizes for the attendees. Breakfast was sponsored by Child's Play and lunch was sponsored by Lakeshore Learning. During registration the Workforce One Bus was present to provide the attendees with an informative tour and opportunity to provide ideas/input on how the bus can be utilized for child care. There were 122 survey submissions with 95 providing feedback. The most common responses were mobile workshops for early learning professional and parent resources.

Alternatives: N/A

Fiscal Impact: Through the professional development contract, some sessions were funded by quality funding, mentoring staff, and some free of charge.

Recommendation: N/A

Next Steps: WSA staff recommend reviewing the survey submissions and beginning the planning process.



MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented By: Teresa Chavez, Chief Operating Officer

Date: November 20, 2025

Subject: **Community Feedback Survey: Planning for Quality**

Summary: This item addresses the collaborative survey designed to receive feedback from the Early Care & Education Committee.

Analysis: To ensure that the community can provide input and feedback regarding initiatives and collaborative efforts utilizing quality funding, that align with the allowable areas. Workforce Solutions Alamo is requesting that the committee members provide feedback by submitting the survey which focuses on planning for quality. The survey outlines collaborative opportunities, professional development, materials specific to age/skill development/area, special initiatives, other initiatives and resources.

Additional background, WSA created an Early Learning Program needs assessment that was shared with child care programs to provide input in the efforts for planning for quality for BCY 26, survey sent on August 5th, 2025, 418 surveys submitted. This is an increase from last years participation of 266 submissions.

Alternatives: N/A

Fiscal Impact: Feedback from the survey will assist in the planning for quality for BCY26, along with feedback received from Early Learning Programs with an active child care services agreement.

Recommendation: WSA Child Care staff recommend that the committee assist with the efforts for planning for quality to elevate early learning programs in the Alamo by submitting the survey by October 24th, 2025.

Next Steps: Share the results with the committee in the next scheduled Early Care & Education Committee meeting.



MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented By: Victoria Rodriguez, Director of Workforce Services

Date: November 20, 2025

Subject: Youth Program Briefing and Performance

Summary: For Program Year 2026, 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. The PPS for the new contract year is as follows:

workforcesolutionsalamo.org
communications@wsalamo.org

100 N. Santa Rosa Street
San Antonio, Texas 78207
(210) 272-3260

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In-School Youth (ISY) - 2025-2026				
Regional Goals	PARTICIPANTS			Year
	Q1	Q2	Q3	End
Rural	13	25	38	50
Urban	46	92	137	183
Total	58	117	175	234
Services - Rural	Served by Quarter			Year End
Support Services	2	5	7	9
Education/Training	2	3	5	6
Work Experience	4	7	11	15
Services - Urban	Served by Quarter			Year End
Support Services	12	23	35	46
Education/Training	1	1	2	2
Work Experience	24	47	71	95

Out-of-School Youth (OSY) - 2025-2026				
Regional Goals	PARTICIPANTS			Year
	Q1	Q2	Q3	End
Rural	32	64	97	129
Urban	119	238	357	476
Total	151	302	454	605
Services - Rural	Served by Quarter			Year End
Support Services	6	12	18	24
Education/Training	4	7	11	15
Work Experience	8	17	25	33
Services - Urban	Served by Quarter			Year End
Support Services	45	90	135	180
Education/Training	27	53	80	107
Work Experience	49	98	147	196

Performance Accountability

WSA continues to track and communicate performance expectations with the youth contractor, focusing on WIOA-established indicators, including Q2 and Q4 Post-Exit Employed and Enrolled Outcomes, Measurable Skill Gains, Median Earnings, and Credential Attainment Rate.

TWC BCY25 performance reports for youth were just recently made available in Tableau, but both Board and Contractor staff have been able to run Predictive Reports at Work in Texas. The Board is meeting all youth measures except for the Measurable Skills Gains measure. This is due to the measure being recorded on a different timeline than the actual program year.



Employed/Enrolled Q2 Post Exit - Youth (DOL)	MG
Employed/Enrolled Q4 Post Exit - Youth (DOL)	MG
Measurable Skills Gains - Youth (DOL)	NM
Median Earnings Q2 Post Exit - Youth (DOL)	EX
Credential Rate - Youth (DOL)	MG
Credential Rate - All C&T	NM

Alternatives: N/A

Fiscal Impact: Workforce Solutions Alamo (WSA) has made a significant investment in youth workforce development, ensuring young individuals gain valuable skills and career opportunities.

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: Executive Committee

From: Adrian Lopez, CEO

Presented By: Victoria Rodriguez, Director of Workforce Services

Date: November 20, 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 FY2026, WSA will host four major youth career exploration events targeting various industries and youth sub-populations, with additional co-hosting opportunities currently under discussion.

In addition to WCI events, WSA Student HireAbility Navigators host three major career exploration events aimed at educating employers and job seekers about the employment of individuals with unique abilities. October marks National Disability Employment Awareness Month (NDEAM), a key time to highlight these efforts. Additionally, WSA continues to support, endorse, and manage the TX FAME program to strengthen workforce development opportunities.

Analysis:

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October 2, 2025 -Manufacturing Proclamation TX FAME accepted the Manufacturing Month Proclamation issued by San Antonio City Council recognizing the impact the industry makes on the region.

October 8, 2025-Trades Day students show off their skills in Framing/Sheetrock, Mechanical, Electrical, and Plumbing as local teams go head-to-head with other schools in this 4-hour challenge.

October 9, 2025 – Alamo Hires NDEAM Event: A Disability Hiring Fair
Join us for this impactful event designed to help individuals overcome employment barriers. The fair will featured 35+ employers actively hiring and representing Texas' top ten industries.

October 10, 2025 – Walk & Roll to Work
Take part in a motivational stroll around the beautiful Morgan's Wonderland Lake. This event will also include a Reverse Job Fair and Community Disability Resource Vendors.

November 6, 2025 – Alamo Helping Hands Resource Fair
9:00 AM – 12:30 PM | Workforce Solutions Alamo – S. Flores Career Center
Connect with community partners and discover local resources designed to support employment and empowerment.

Current TX FAME Recruitment Schedule: WSA participated in the Palo Alto College Open House on October 6, then the STEM Symposium at St. Philip's College on November 7, and the Poteet High School College and Career Fair on November 14.

Alternatives: N/A

Fiscal Impact: WSA's strategic investments in staff and career exploration events create a 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: Executive Committee

From: Adrian Lopez, CEO

Presented By: Victoria Rodriguez, Director of Workforce Services

Date: November 20, 2025

Subject: **Unemployment Data and Strategy and WARN Update**

Summary: Unemployment data and Worker Adjustment and Retraining Notification (WARN) reports are key tools WSA uses to analyze workforce trends and plan services. Unemployment data, collected through initial claimant lists, supports targeted outreach efforts. WARN notices, submitted by employers to report mass layoffs, allow the state and local board to engage early—working with employers to prevent layoffs or to assist affected employees with relocation and upskilling opportunities. These reports and notifications provide valuable insight for the board, particularly when assessing the Reemployment and Employer Engagement Measure (REEMS). REEMS tracks claimant reemployment within 10 weeks, serving as an indicator of individuals approaching the exhaustion of unemployment benefits and overall regional reemployment performance.

Analysis: During FY2025, WSA observed a significant rise in Unemployment Insurance (UI) claims across August and September. In the Alamo area, claims tripled compared to typical monthly levels. In response, the board analyzed whether this increase affected the Reemployment and Employer Engagement Measure (REEMS) denominator or correlated with a rise in WARN notices. The REEMS denominator did in fact grow by approximately 3,000 individuals. WSA promptly reported these findings to the state, after which boards were notified on September 30th of an increase in UI fraud cases.

Despite this, WSA staff implemented a proactive outreach strategy to connect job seekers with employment opportunities. Efforts included leveraging Workforce One for targeted outreach, hosting regular hiring fairs, and continuing Rapid Response activities with employers issuing WARN notices. As WSA remains committed to linking employers and job seekers, the community can expect continued engagement through hiring events, outreach efforts, and strategic partnerships that help individuals secure meaningful employment.

Alternatives: N/A

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Fiscal Impact: The WSA Board may expect expenditures to increase as the unemployment numbers increase. Unemployment may also lead to use of other program funds such as TANF, SNAP E&T, or RESEA.

Recommendation: It is recommended that staff collaborate closely with the MIS team, contractors, and employers to quickly identify individuals who have become unemployed, allowing for early intervention and support before they need to rely on other assistance programs.



MEMORANDUM

To: Executive Committee

From: Adrian Lopez, Chief Executive Officer

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

Date: November 20, 2025

Subject: TWC Annual Monitoring Update

SUMMARY: Staff are reporting three separate TWC performance audits (monitoring reviews). This agenda item does not require Board action.

BACKGROUND:

- 1. Annual Monitoring:** WIOA §184 requires TWC to perform annual monitoring at each Board area. To that purpose, TWC audits, reviews, and conducts comprehensive monitoring activities to ensure that all programs achieve their intended results while maintaining fiscal accountability and compliance with applicable laws, rules, and regulations, in accordance with uniform administrative requirements for grants and agreements.
- 2. Child Care Improper Payments (CCIP) Monitoring:** The Texas Administrative Code §809.117 requires Boards to attempt to recover all improper Child Care Services (CCS) payments, from parents and providers, in accordance with TWC policies and procedures. For this monitoring, TWC follows the requirements of the Administration for Children and Families (ACF).
- 3. Equal Opportunity Monitoring:** WIOA §188 requires TWC to perform reviews designed to ensure equal opportunity (EO) and equal access for all members of the public. Compliance encompasses the development, administration, and enforcement of local and TWC guidelines, as well as Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act (ADA) Title II, and the Civil Rights Act of 1964, which prohibit discrimination in programs and activities receiving Federal financial assistance. Ms. Rebecca Balencia, WSA's EO Officer, is coordinating the audit with the State EO Officer and their staff, and the monitoring is ongoing.

TWC MONITORING OUTCOMES:

TWC Annual Monitoring

TWC auditors initiated this year's annual review on 8/14/2025 and held an Exit Conference on 10/23/2025. The scope of the evaluation spanned from August 1, 2024, to July 31, 2025. TWC's audit covered multiple areas, including Fiscal, Procurement, Property, Programs, MIS/Automation, MOU/Infrastructure Agreement, Asset Testing, Monitoring, as well as PII, Priority of Service Center, and Cash Equivalents Walkthroughs.

Exit Report (attached)

The Exit Report did not identify any questionable costs. This 'preliminary' report included five issues, which the Final Report may or may not include (or it may include items that were not in the draft).

1. **Procurement:** The Board did not ensure the Legal Counsel Services resulting contract aligned with the Solicitation Document. TWC reported a potential issue with the retainer amount, and two possible problems with the RFP: the selection of the firm and the cost estimates. WSA submitted a response to this item, which staff hope TWC will accept.
2. **Property:** Three Notification of Property Acquisition forms (Form 7200) were not submitted within 30 days following the final acquisition of the equipment. They were submitted between 83 and 163 days after the due date.
3. **Fiscal:** The external monitor's Single Audit desk reviews for two subrecipients were not completed by the Board within six months of the subrecipients' single audits' publication.
4. **PII/Center Walkthroughs:** TWC tested PII, Priority of Service, and Cash Equivalents at Floresville, Pleasanton, San Antonio Food Bank (Workforce One bus), and O'Connor.
 - Floresville: There were no staff present at the entrance to ensure customers were signing in or registering when they entered the center (no first barrier of protection for PII). Having only one staff member at the center created concerns about barriers, customer service, and staff security.
5. **Reemployment Services and Eligibility Assessment (RESEA):** This is the first year TWC has tested RESEA services. The grant is also a 'pilot,' experiencing budgeting, staffing, and technical assistance challenges similar to those encountered by most new grants. Because of this, its results may be reported as 'area of concern' (instead of 'findings'), but we will not know until we receive the final report. TWC reported six potential findings, including:
 - Using less than three methods of communication for appointment reminders (70% error rate).
 - Not providing customers with all required services on the same day as the Initial Appointment (67% error rate).
 - Not reviewing and uploading Work Search Logs to the customer's profile (13% error rate).
 - Not completing and uploading the Customized Labor Market Information form (7% error rate).
 - Not including all the goals outlined in the guide in the Individual Reemployment Plans (93% error rate).

- Not sending WF-42 forms in a password-protected or encrypted email (100% error rate – however, TWC only tested two cases for this attribute).

Child Care Improper Payment (CCIP) Testing

TWC tested the CCIP for Child Care Services (CCS). The engagement included approximately 25 cases. TWC did not issue an Exit Report but will generate a Final Report around June 2026 after they complete 2nd-level reviews. The report will identify any potential Improper Payment amounts owed to the State, which will be handled through Audit Resolution.

Equal Opportunity (EO) Monitoring

TWC is currently performing its annual EO Monitoring to ensure equal opportunity and equal access for all members of the public. WSA’s EO Officer, Ms. Rebecca Balencia, is coordinating the audit. Staff will continue to report progress.

Next Steps

- **TWC’s ‘Embargoed’ Report:** TWC will issue an informational (non-public) copy of the report to the CEO five business days before issuing the final report (around April 2026).
- **Monitoring Letter:** If there are no issues, TWC will issue a letter (otherwise, they will issue a report).
- **Monitoring Report:** If there are findings, TWC will issue a final report via e-mail to the Board Chair, Board Executive Director, designated representatives of the US Dept of Health and Human Services, Dept of Labor, TWC, and other TWC executive staff.
- **Audit Resolution:** Findings from the report will go to TWC’s Audit Resolution department, with whom WSA will coordinate to resolve the issues within 45 days.

STAFF RECOMMENDATIONS:

Staff from the associated departments are developing *action plans* to address these and any other issues that TWC may have ‘flagged’ but not reported, including some that staff resolved during the monitoring. For each issue, the action plans will include at a minimum four elements:

- An examination of the root causes,
- A review of existing (or the development of) procedures,
- Staff training, and
- Additional internal controls (to monitor and test progress for each item).

Staff will consolidate and prepare the documentation of the actions in anticipation of audit resolution, which QA will help coordinate.

FINANCIAL IMPACT: The TWC monitoring has not reported any questionable costs.

STRATEGIC OBJECTIVE: To help ensure that local employment and training activities, including one-stop delivery systems and workforce development services, appropriately use, manage, and invest funds as required and in ways that maximize performance outcomes (WIOA Sec. 107(d)(8); WIOA Sec. 134(2)(B)(iv); WIOA Sec. 183; WIOA Sec. 185(c)(3); WIOA

Sec. 121(3); WIOA Sec. 129(b)(1)(e); TWC's Board Oversight Capacity evaluation, Texas Labor Code §302.048, TWC Rule §Title 40, Part 20, Chapter 802, Integrity of the Texas Workforce System, particularly §802.61; WD 29-15, Chg. 1; TWC Agency-Board Agreements and Grant Contracts).

ATTACHMENTS:

1. TWC Exit Conference Report

Workforce Solutions Alamo

Exit Conference Report

Project #26.20.0001

To: Board's Staff, Other Representatives, & TWC Monitoring Team
From: Ernesto Cantú, Project Manager
Date: October 23, 2025
Time: 3:30pm
RE: Exit Conference Report with the Workforce Solutions **Alamo**

I. Introductions & Sign-In:

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

II. Scope

The scope of this review encompassed the program year beginning **August 1, 2024, through July 31, 2025.**

III. Issues and Documentation

Procurement—

The Board did not ensure the Legal Counsel Services (#2. 2024- 019) contract was in line with the Solicitation Document:

- The Board wrote a \$7,900 retainer into the contract, when the response from Martin & Drought stated \$7,500. The Board did not provide enough justification for increasing the amount.
- The score for the selected firm (Martin & Drought) was 13.3 pts. (average) less than the higher scoring firm (JCA). The Board did not provide enough justification to support selection.
- The RFP stated the previous five years legal expense was \$450,000, or \$90,000 a year. The cost estimate for JCA was \$126,000, and Martin & Drought's was \$94,800 however it is unclear how they arrived at these estimates.

Single Audit—

The external monitors Single Audit desk reviews, for two (2) subrecipients, were not completed by the Board within six months of the single audits' publication.

Property—

The Board did not ensure property forms were submitted timely. The Board did not submit three Notification of Property Acquisition - Forms 7200 within 30 days following the final acquisition of the equipment, as required. The forms were submitted 83 to 163 days late.

Personal Identifiable Information (PII)—

The Board did not ensure the security of Personally Identifiable Information (PII). During the walkthrough of the Floresville Workforce Center, the TWC monitor noted the Board did not have the first barrier in place at the entrance. There was no staff monitoring the front door to ensure that customers are signing in or registering when they enter the center. The center only had one staff at the center for workforce services creating a concern with barriers, customer service and staff security.

RESEA—

The Board did not ensure RESEA program requirements were followed. The following errors were noted:

- In 16 of 23 (70% error rate) applicable case files tested, all three methods of communication for outreach appointment reminders were not used and documented in the case note.

Workforce Solutions Alamo Exit Conference Report Project #26.20.0001

- In 10 of 15 (67% error rate) applicable case files tested, the claimant did not receive all the required services on the same day during the Initial RESEA appointment.
- In two of 15 (13% error rate) applicable case files tested, the work search logs for the prior two weeks were not reviewed and uploaded to the customer's profile.
- In one of 15 (7% error rate) applicable case files tested, the Customized Labor Market Information (CLMI) form was not completed and uploaded to the customer's profile.
- In 14 of 15 (93% error rate) case files tested the Individual Reemployment Plan did not contain all the goals outlined in the guide and complete.
- In all two applicable case files tested (100% error rate), the WF-42 was not sent in a password or encrypted protected email.

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

IV. Reporting Process:

You will receive a report of our findings, if any, upon completion of our fieldwork. The Executive Director (or appropriate representative for non-Board reviews) will be provided a courtesy copy of the final report five days prior to its dissemination. The five-day embargo period allows the Board to provide a response to each individual finding. The Board's response will be included in the final report. If no response is received, SRM will state that no response was received in the report. (FDCM Letter 05-2024). If the review results in no issues identified, a management letter will be issued, and the review closed. (40 T.A.C. 802.65(a))

V. Resolution Process:

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

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

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

VI. Special Requests:

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

- A. Monitoring Technical Assistance –** For monitoring tools, procedures and training: informal or formal.
Contact person is: Alma I. Gonzalez, Training Coordinator/Monitoring TA
Telephone: (512) 755-5546 (C);
Email or Microsoft Teams: alma.gonzalez2@twc.texas.gov

Workforce Solutions Alamo Exit Conference Report Project #26.20.0001

B. Fiscal Technical Assistance – For answers to financial questions, you may email TWC fiscal technical assistance workgroup at Fiscal.ta@twc.texas.gov

C. Program Technical Assistance Requests:

Applicable Grant Manager: Janice Henschen: janice.henschen@twc.texas.gov

Workforce Policy & Program Assistance:
Email wfpolicy.clarifications@twc.texas.gov

VII. Customer Service

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

Mary Millan

Deputy Director

Fraud Deterrence and Compliance Monitoring Division

Email: mary.millan@twc.texas.gov

VIII. Closing Remarks & Questions

Workforce Solutions Alamo Exit Conference Report Project #26.20.0001

IX. Acknowledgement

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

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

Executive Director or Designee

Date

Ernesto J. Cantú

10/23/2025

TWC SRM Project Manager

Date



Jason Stalinsky
Director, Division of Fraud Deterrence and Compliance Monitoring
Texas Workforce Commission

Date



**Workforce Solutions Alamo
Exit Conference Report
Project #26.20.0001**

Sign-In Sheet

PLEASE PRINT CLEARLY

	Name	Job Title	Organization Name
1.	Ernesto Cantú	Project Manager	TWC, FDCM/SRM
2.	Nadine Butler	Program Monitor	TWC, FDCM/SRM
3.	Chiffon Mitchell	Program Monitor	TWC, FDCM/SRM
4.	Lin Banks	Fiscal Monitor	TWC, FDCM/SRM
5.	Alan George	Fiscal Monitor	TWC, FDCM/SRM
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MEMORANDUM

To: Executive Committee

From: Adrian Lopez, Chief Executive Officer

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

Date: November 20, 2025

Subject: Quality Assurance Briefing

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

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

- *Non-Custodial Parent Choices (NCP) – C2 GPS:* 100% complete, with an overall 72.94% accuracy rate, which did not meet the 90% threshold. The testing identified eight attributes for continuous improvement:
 - Immediately notifying OAG of noncompliance and attempting to re-engage the participant weekly before submitting a Request to Remove (79.17%).
 - Opening a monthly 11-Planned Gap in Service activity when submitting a Request to Remove form to OAG, until OAG approval (81.25%).
 - Closing cases on the date of the OAG Notification Date approval (TWIST) or after 10 business days if there is no OAG response (WIT) (88.24%).
 - Opening an Unsubsidized Employment activity when the NCP obtains employment (80.00%).
 - Recording and verifying employment outcomes when Unsubsidized Employment is the last service (50.00%).
 - Validating accurate case closures when the NCP meets program requirements (71.43%).
 - Documenting all activities, services, and outcomes in case notes and COLTS within three business days (6.67%).
 - Maintaining weekly contact with the NCP until obtaining employment (76.67%).
- *Temporary Assistance for Needy Families (TANF) – C2:* 100% complete. Currently working on the Final Report.
- *Ready to Work – Various partners:* 94% complete.
- *WIOA Youth – SERCO:* 95% complete, currently reviewing the Final Report.

WSA Internal QA Program Monitoring

- *Contractor QA Review (C2GPS, SERCO, and COSA):* QA's review of the subrecipients' quarterly monitoring reports is 100% complete. The effort is ongoing, including an evaluation of their monitoring systems (e.g., structure, frequency, scope, timelines, capacity, focus, etc.). The oversight includes assessing the contractor's processes and actions to ensure consistent adherence to standards and demonstrate follow-up progress (of accuracy rates). Staff will use the analysis to strengthen internal controls.

Other Activities:

- *Program Monitoring Contract Renewal:* Staff are processing a contract renewal for Ms. Christine Nguyen, CPA, to continue providing programmatic monitoring services for this coming contract year.
- *Risk Assessment and Timeline:* Staff are completing this new year's risk assessment and timeline (and closing this year's reviews).
- *Subrecipient Contract Renewals (C2GPS and SERCO):* Staff completed the Statements of Work (QA sections), as well as the Participant Planning Summaries (PPS) (enrollment and service targets) and Profit Matrix for subrecipient contract renewals.
- *Board Oversight Capacity:* Coordinated development and submission to TWC.
- *WSA Staff Training:* Now that the TWC annual monitoring has ended, Dr. Ricardo will continue providing staff training regularly.
- *Policies:* Continue reviewing and providing guidance on varied policy-related items.

STAFF RECOMMENDATIONS:

- QA will be performing formal (instead of informal) testing of attributes with accuracy rates below the 90% threshold and report these out to the Board. The adjustment will help us better meet TWC's follow-up expectations.
- Continue supporting Program Operations' continuous quality improvement efforts with contractors.
- QA's review of the contractor's monitoring systems aims to strengthen their internal controls to minimize the quantity of attributes not meeting the 90% accuracy target.

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: None.



Estimated Timeline – External Program Monitoring Activities 2024-2025

Initial Estimated Timeline				Actual Timeline						
External Program Monitoring	Duration ⁺⁺	Start	Finish	Duration ⁺⁺	Effort	Variance	Start	Finish	% Complete	
Estimated Timeline: 2024-2025	241	12/2/2024	11/3/2025	237	289	Duration	12/2/2024		99%	Comments
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%	
SERCO - WIOA Youth	41	7/7/2025	9/1/2025				7/7/2025		95%	Extension granted for holiday, and delays due to TWC Annual Monitoring. Currently reviewing Final.
C2GPS - TANF/Choices	40	9/3/2025	10/28/2025	40	40	0	9/3/2025	10/28/2025	100%	Reviewing Final Report before issuance.
CONSORTIUM - Ready to Work	21	10/6/2025	11/3/2025				10/8/2025		94%	
Avg Duration or Effort (days) →				49	48	9				
Multi-tasking (% days overlapping projects) →				24.5%	-18.6%					

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

Modification Notes

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



Estimated Timeline – *Internal Program Monitoring Activities 2024-2025*

Initial Estimated Timeline				Actual Timeline						
<i>Internal Program Monitoring</i>	<i>Duration</i> ⁺⁺	<i>Start</i>	<i>Finish</i>	<i>Duration</i> ⁺⁺	<i>Effort</i>	<i>Variance</i>	<i>Start</i>	<i>Finish</i>	<i>% Complete</i>	
Estimated Timeline: 2024-2025	244	11/12/2024	10/17/2025	254	276	<i>Duration</i>	11/12/2024		100%	<i>Comments</i>
C2GPS - SEAL	34	11/12/2024	12/27/2024	16	11	-18	11/12/2024	12/3/2024	100%	Completed ahead of schedule.
C2 GPS - RESEA	34	12/3/2024	1/17/2025	31	21	-3	12/3/2024	1/14/2025	100%	Completed ahead of schedule.
Informal Reviews - Follow up on Repeat Findings	63	1/7/2025	4/3/2025	40	39	-23	1/7/2025	3/3/2025	100%	Completed ahead of schedule.
C2GPS - SNAP E&T	34	4/4/2025	5/21/2025	34	34	0	4/21/2025	6/5/2025	100%	Adjusted schedule for PII & Priority of Service walkthroughs.
PII Walkthroughs and Priority of Service	33	4/30/2025	6/13/2025	33	24	0	3/4/2025	4/17/2025	100%	Adjusted start to begin earlier.
C2GPS- SNAP 45-day Plan				85	85	85	6/18/2025	10/14/2025	100%	
Contractor QC Review (C2GPS, SERCO, COSA) - Phase I				27	15	27	7/2/2025	8/7/2025	100%	1st phase review of contractor internal monitoring reports completed.
TWC Annual Monitoring	66	8/1/2025	10/31/2025	79	47	13	7/15/2025	10/31/2025	100%	TWC Annual Monitoring Engagement began earlier than estimated.
Contractor QC Review (C2GPS, SERCO, COSA) - Phase II							11/1/2025			Phase II review of contractor's quality control in progress - will be included in new year's timeline.
Avg Duration or Effort (days, excludes Other) →				44			43	35	-1	
Multi-tasking (% days overlapping projects) →				7.6%			-26.4%			

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

Modification Notes

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



MEMORANDUM

To: Executive Committee

From: Adrian Lopez, Chief Executive Officer

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

Date: November 20, 2025

Subject: Board Oversight Capacity

SUMMARY: Staff are presenting TWC's *Board Oversight Capacity* evaluation. The item does not require Board action.

BACKGROUND:

As part of ensuring the integrity of the Texas workforce system, Texas Labor Code §302.048 establishes the criteria for assessing the Board's capacity to oversee and manage local funds and the delivery of local workforce services. To that purpose, TWC evaluates the Board's capacity to:

1. Develop, maintain, and upgrade comprehensive fiscal management systems.
2. Hire, train, and retain qualified staff to carry out the board's oversight activities.
3. Select and oversee local contractors to improve the delivery of workforce activities.
4. Oversee and improve the operations of local career development centers in the area.
5. Manage the contractors' performance across multiple board programs.
6. Identify and resolve long-standing or severe Board oversight problems and workforce service provider performance issues.

TWC rule §802.67 provides that TWC will evaluate, on at least an annual basis, each Board's oversight capacity. To that end, TWC utilizes a *Board Oversight Capacity Ratings* scorecard and posts the evaluation results on its website.

In addition, TWC requests that Boards provide an *Area Community Impact Statement*. The statement summarizes the Board's impact on and relationship with the local community and economy. It specifies how its efforts demonstrate and contribute to an effective workforce system by engaging employers, helping workers find jobs, and ensuring good fiscal stewardship.

OVERSIGHT CAPACITY RATINGS

According to Workforce Development Letter (WD) 29-15, Change 1, TWC assigns a rating of “Meets Standards” or “Below Standards” to each of the six categories. Both the *Alamo Area’s Score Card* for BCY 2024 (from last year) and the evaluation form we submitted on October 31st for this most recent year are included as attachments. The years run from October to September.

WSA successfully met all standards in BCY 2024.

NEXT STEPS:

Staff submitted the *Board Oversight Capacity Ratings, Board Attestation & Community Impact Statement* on October 31, 2025, and will wait for the scorecard or any feedback requested from TWC.

STAFF RECOMMENDATIONS:

- WSA met BCY 2024’s standards.
- Staff recognize the importance of each criterion and will continue focusing efforts to ensure WSA meets expected oversight standards and continue ensuring the integrity of the Texas workforce system.

FINANCIAL IMPACT: Severe or long-standing performance issues may have an impact if they arise. “Severe” performance issues are defined as issues serious enough to warrant a sanction, or intent-to-sanction, and “long-standing” is defined as an issue that persists for more than one review period. Issues of this nature may carry financial and additional impacts. Currently, there are no severe, long-standing, or other issues.

STRATEGIC OBJECTIVE: WSA continues to promote and instill a culture of continuous quality improvement and internal controls in various ways to help ensure that the Board successfully fulfills WSA’s oversight capacity responsibilities and goals, as defined by the State and any locally defined criteria.

ATTACHMENTS:

Board Oversight Capacity – BCY 2024 (found here: [Alamo Area Score Card 2024](#)).

Board Oversight Capacity – BCY 2025 (submitted to TWC October 30, 2025).

Board Oversight Capacity—BCY 2024

TWC Rule §802.67. Commission Evaluation of Board Oversight Capacity

Alamo Area Score Card

The Texas Workforce Commission’s annual evaluation of each Board’s oversight capacity. Boards are assigned a rating of Meets Standards or Below Standards for each of the following six categories.

Develop, maintain, and upgrade comprehensive fiscal management systems

Meets

- √ Does the Board have fiscal management systems in place that include appropriate fiscal controls?
- √ * Does the Board, during its regularly scheduled meetings, include a quarterly review of the financial status of the Board and its service providers for all funding sources it administers?
- √ Have single audits been free of material weaknesses?

Hire, train, and retain qualified staff to carry out the Board’s oversight activities

Meets

- √ Has the Board been certified?
- √ * Has the Board hired or retained qualified staff (Executive Director, Chief Financial Officer, Program Director, Contract Management Staff, Monitoring staff) to oversee contractors?

Select and oversee local contractors to improve the delivery of workforce services

Meets

- √ Does the Board have an effective formal procurement process, and has the Board been following this process?
- √ Does the Board have a certified monitoring function in place to oversee contractors?
- √ The Board has no disallowed costs exceeding one percent of allocation (non-self-reported).
- √ The Board has no disallowed costs exceeding one percent which resulted in repaying funds.

Oversee and improve the operations of Workforce Solutions Offices in the Board’s service area

Meets

- √ Does the Board have certified Workforce Solutions Offices?
- √ * Can the Board provide documentation demonstrating that it has policies in place to address service improvement, such as the initiation of performance improvement or service improvement plans when performance issues are identified with a local contractor?
- √ * Has the Board applied its service improvement policy when necessary?

Manage the contractors’ performance across multiple Board programs

- **Did the Board meet target on at least 80 percent of its contracted performance measures?
- **Is the Board within 35 percent of target on all contracted performance measures?
- ** Does the Board hold performance oversight meetings, do performance reviews, or, during its regularly scheduled meetings, include a review of its status on contracted performance measures at least four times throughout the year?

Identify and resolve long-standing or severe Board oversight problems and workforce service provider performance issues	Meets
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- ** The Board did not miss target on the same performance measure two years in a row.
- √ The Board does not have any unresolved material weaknesses discovered through a single audit.
- √ The Board has not been placed on an Intent to Sanction or a Sanction.

√ = Meets Standard
X = Below Standard
* = Board Attestation
** = Due to performance data tracking updates made during this Board Oversight Capacity review cycle, these criteria will not be rated for BCY 2024.

ALAMO AREA COMMUNITY IMPACT STATEMENT

A written statement from each Board summarizing its impact on and relationship with the local community and economy. Specify how the Board's efforts demonstrate and contribute to an effective workforce system by engaging employers, helping workers find jobs, and ensuring good fiscal stewardship.

At Workforce Solutions Alamo, our work focuses on preparing people for meaningful careers while developing innovative workforce solutions for businesses in targeted industries, providing long-term stability through high-growth, high-wage employment opportunities.

Our core values set the foundation from which we serve and help guide our decisions to empower job seekers, support employers, and uplift communities. We are committed to addressing our region's most pressing workforce development challenges. We aim to accelerate economic growth and success in the Alamo Area by remaining true to these values.

- Mission: To strengthen the Alamo regional economy by growing and connecting talent pipelines to employers.
- Vision Statement: To lead the most integrated community workforce network in the nation.
- Core Values: Accountability / Collaboration / Excellence / Innovation / Integrity

Sector-Based Model

WSA's strategies focus on centering workforce development services within a sector-based model. By targeting key industries, such as Aerospace, IT and Cybersecurity, Manufacturing and Trades, Healthcare, Logistics and Warehousing, Construction, Finance, and Business/Customer Service and Administration, WSA effectively narrows the gap between local demand and local talent pipelines. The following is an impact summary of Workforce Solutions Alamo services in the 13 counties we proudly serve.

Overview

Workforce Solutions Alamo (WSA) serves nearly 113,000 registered job seekers within the 13-county region by providing comprehensive career and supportive services for job seekers and employers. Services include over 97,000 in-person visits at our Job Centers (Oct. 2023 to Sep. 2024). Year-to-date, 11,490 job seekers have been placed in a job through the labor-exchange system WorkInTexas (WIT). Through our partnerships with 2,208 unique employers, WIT posted 33,462 jobs.

Through our formula-funded services, WSA has enrolled 4,331 customers in workforce programs while providing them with 27,724 units of service, including universal job seekers. WSA focuses on outreach through consortium partnerships, non-profit organizations, and braiding resources with complementary

programs, such as the City of San Antonio's Ready to Work Program, a \$200M sales tax-funded workforce training initiative, serving 2,671 job seekers (Oct 2023 to Sep. 2024).

WSA also connects job seekers with employers through virtual Career Fairs. Virtual Career Fairs offer new ways to connect employers with local talent pipelines. WSA held 48 Job Fairs, with 760 employers participating and 6,207 interviews, resulting in 489 hires.

WSA's efforts include re-engaging unemployed claimants. Of the 61,976 unique claimants in the region, 48,810 (or 78.7%) returned to work and were reemployed (from October 2023 to September 2024).

Child Care Services

Child Care is more than just a service; it is a critical component of our society's infrastructure. It plays a pivotal role in supporting our current workforce and nurturing the future generation. By ensuring children are ready to succeed in school and life, quality Child Care strengthens our community and economy.

In the recent fiscal year 2024, WSA invested approximately \$119M to cover the cost of Child Care for families working or pursuing education.

Building a Network of Quality

WSA recognizes that child care quality links directly to provider quality. To support these dedicated professionals, WSA invested an additional \$5.2M in various initiatives, including:

- **Texas Rising Star Mentorship:** Mentorship and guidance to child care centers seeking Texas Rising Star certification.
- **Provider Support:** Investing in resources like classroom materials, curriculum, assessments, and professional development.
- **Financial Incentives:** Offering retention grant opportunities to encourage providers to maintain high standards of care and pursue continuous improvement.
- **Business Coaching:** Using TWC QIA funding, we designed the coaching to offer essential supports tailored to meet provider business needs, including resource connections, one-on-one coaching, needs analysis, networking facilitation, and training and technical assistance.
- **Cohort Model:** our cohort model has proven to be a powerful tool in fostering a community of excellence among providers. By bringing together centers at various stages of their journey toward Texas Rising Star certification, WSA creates a supportive environment for learning, collaboration, and shared best practices.
- **Scholarships:** For fiscal year 2024, WSA provided scholarships to an average of 14,375 children and 8,315 families daily.
- **Economic Impact:** Working parents' earnings from childcare scholarships totaled approximately \$267M.

Strategic Regional Impact

WSA's strategic regional goals aim to expand the workforce development customer base by leveraging unique knowledge and resources. To that effect, WSA's community impact promotes TWC's statewide goals of service optimizers, Texas talent experts, and partnership managers.

- **Alamo Workforce Consortium:** WSA's expansion begins by building partnerships. To better address the continued uncertainties presented in 2021, WSA sought to strengthen and build upon existing partnerships while leveraging and elevating the services offered by these community partners. Workforce Solutions Alamo developed a Consortium of strategic partners focused on improving the regional economy by connecting talent pipelines to employers. Consortium partners include the San Antonio Food Bank, Texas A&M San Antonio, Chrysalis Ministries, YWCA, Family Service Association, AVANCE San Antonio, United Way of San Antonio, Bexar County, and Opportunity Home. The collective impact of the Consortium engages an additional 6,000 clients and recruits them into the workforce ecosystem by removing self-sufficiency barriers through education, training, and employment. Collectively, the Consortium will expand the reach of individual agencies and increase access to financial literacy, housing, food, childcare, and quality education and training. The Consortium offers an efficient referral process that further promotes leveraging by reducing duplication of services. Clients can enroll in education and training to prepare for high-growth, high-wage occupations and industries while receiving the support needed to successfully reach their career goals, while employers receive the benefit of a robust workforce to support business demands.

With our partnerships, WSA leverages substantial non-federal resources (and some federal) to expand our customer base and make a long-lasting impact:

- **TX FAME:** WSA applied and was selected as a TX FAME Hub agency for FAME USA. This is an educational program that promotes STEM and Advanced Manufacturing career pathways. As a TX FAME Hub, WSA positions itself with sixteen manufacturing employers and a FAME USA network that fosters job growth.
- **Pathways to Infrastructure:** The Pathways to Infrastructure grant promotes employer education and supports workforce needs by offering resources to increase employment for job seekers. This DOL funding includes a nine-month planning stage to seamlessly incorporate the program with other funding opportunities.
- **Partners in Reentry Opportunity in Workforce Development:** The Board is one of seven to receive the PROWD grant. Through this project, WSA will collaborate with the local residential reentry center and enroll individuals in education and training to prepare for their exiting incarceration.
- **Childcare Grants:** In childcare, our board has received over \$292,300 to promote training, new curriculum, and improve operational capacity.
- **Child Care Match Dollars:** With the City of San Antonio's historical matching, WSA increases the availability of child care services by \$7,584,186, substantially broadening our reach.
- **Teacher Externship:** While TWC did not award WSA needed funding this year, the Alamo continued building career pathway awareness and promoting workforce development utilizing non-federal funds, with which we supported stipends for 50 educators.
- **Ready to Work:** A consortium of WSA and additional local community-based partners entered a contract with the City of San Antonio to provide job training and employment services. The initial contract adds approximately \$62,163,075 to WSA, with an estimated \$59,290,162 as pass-through to our community partners over three years. The funding derives from a 1/8 cent sales tax collected through May 2025. Performance measures include training completion (credentials), employment (job gain),

and wages (\$15.00 per hour), which directly promote WSA's and the Texas Workforce Commission's strategic and performance goals. WSA and Consortium partners have enrolled 6,702 job seekers, with 4,330 participating in training and 758 securing employment with average wages of \$20.07 in key talent pipelines, including Healthcare, IT/Cyber Security, Construction, Finance, Education, and Manufacturing.

- Finish Line Grant: Toyota Foundation donated the Finish Line Grant, approximately \$100K dollars, to the San Antonio Area Foundation for Ready to Work participants who provide proof of employment.

Workforce Academy Ambassador Program

The San Antonio Area Foundation awarded \$100,000.00 to WSA for the Workforce Academy Ambassador Program. The grant aims to advance equity and economic mobility through workforce development services by educating individuals in partner organizations within the 13-County Alamo region. The initiative translates the numerous existing workforce activities into a concise and accessible curriculum to help organizations and individuals better understand and share the services we provide to clients and what career opportunities and jobs are available. Individuals participate in three sessions, including Workforce 101, Workforce Programs, and Workforce Business Services. We provide individuals with a toolkit, program information, and the knowledge to carry out our mission. Ambassadors play a vital role in connecting people to resources and programs that can assist them in starting or furthering their careers in growing industries. The Academy drives conversations and educates individuals about workforce development, helps expand our outreach, increases our ability to graduate ambassadors, and broadens brand awareness. Approximately 358 Workforce Ambassadors support WSA's mission by disseminating resource information, recruiting program participants, and identifying workforce development needs.

Aspen Institute's Economic Opportunities Program

Aspen Institute's Economic Opportunities Program has awarded \$50,000.00 to WSA to be used exclusively for the Workforce Leadership Academy. The Academy will leverage and build on the expertise of leaders across the workforce ecosystem through an intensive 12-month learning program. Local leaders and guest faculty from across the nation lead the program to develop a network of workforce development leaders who can spearhead their programs or organizations and work collaboratively to build effective workforce systems. Workforce Leadership Academy incubates Ambassadors at the Executive Leadership level who will promote WSA's local plan and help them understand our programs, the sector-based model, and how their organizations contribute to the workforce ecosystem. The WSA Workforce Academy provides a grassroots approach to drive conversations about workforce development in partner organizations and communities. It can potentially increase program enrollment and success and expand brand awareness. As we continue refining the Academy, the Aspen Workforce Leadership Academy provides the opportunity to add a "grass-tops" component to the existing collaboration and systems development model. Frontline ambassadors are invaluable for communicating the benefit of the workforce board. Success is often predicated on supporting the partner organization's senior leadership to act as advocates in strategic planning sessions and other areas of influence so that knowledge gained at the frontline level can be leveraged into action and support the partner organization. Grass-tops and grassroots are the foundation for generative collaboration and rapid innovation.

Conclusion

Our mission, vision, and core values embody the transformative spirit of “work” and hold us to the highest standards of serving. By remaining centered on this work and through a collaborative approach to meet and exceed the needs of our communities, the investments we make today will enable those we serve to thrive and realize this same promise for generations to come.

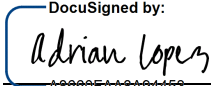
BOARD OVERSIGHT CAPACITY RATINGS

Board Attestation & Community Impact Statement

Purpose

As required by law ([Texas Labor Code §302.048](#)), the Texas Workforce Commission (TWC) evaluates Board capacity to oversee and manage local funds and the delivery of local workforce services, and makes the evaluation results available.

Board Name: Workforce Solutions Alamo (WSA)

Form Submitter: 
Adrian Lopez, CEO

Board Attestation

Develop, maintain, and upgrade comprehensive fiscal management system.

✓ Does the Board, during its regularly scheduled meetings, include a quarterly review of the financial status of the Board and its service provider, for all funding sources it administers?

☒ Yes ☐ No

- WSA regularly reviews financial status and budgets for all funding sources of the Board and its service providers. The reviews occur with the Board of Directors (fourteen times a year), including the Audit & Finance Committee, the Executive Committee, and the Full Board of Directors.
- Appropriate internal financial controls are in place, and WSA has had eight years of Single Audits free of material weaknesses.

Hire, train, and retain qualified staff to carry out the Board's oversight activities.

✓ Has the Board hired or retained qualified staff (Executive Director, Chief Financial Officer, Program Director, Contract Management Staff, Monitoring staff) to oversee contractor?

☒ Yes ☐ No

WSA is committed to hiring, training, and retaining qualified staff for key positions to oversee the agency's subrecipients and contractors.

- **Chief Executive Officer (CEO):** The Board contracted the Executive Director (CEO) in November 2019.
- **Chief Financial Officer (CFO):** The Board hired a CFO in July 2024, but the position was vacated in September 2025, and WSA is currently searching for a CFO. The department includes a Controller position, which was hired in July 2023. WSA also procured a consultant to provide training and guidance in advanced (senior-level) policy

administration and management work. The consultant firm assists in all aspects of WSA's fiscal operations.

- **Chief Operations Officer (COO):** The Board hired a COO in September 2023. The COO oversees subrecipient contracts and associated grants and services, performance, the American Job Centers, and the functions of the agency's EO Officer. The department hired a Director of Workforce Services in April 2024.
- **Chief Process Officer (CPO):** The Board hired a CPO in January 2024 to spearhead organizational improvement and strategic initiatives. The CPO drives continuous improvement and operational excellence through strategic technology enhancements and seamless cross-functional collaboration, overseeing IT (including cybersecurity), data and research, and Monitoring.
- **Monitoring:** The Board hired a Director of Quality Assurance (QA) in January 2015 and a Workforce Monitor II in November 2020. The Director of QA oversees the agency's oversight and monitoring systems. The Board also contracts an external monitoring consultant for fiscal and program monitoring.
- **Procurement:** The Board had an Interim Director of Procurement starting June 2024 through February 2025, and has hired a Director of Procurement in February 2025. The Director of Procurement oversees the agency's contracting processes and property.

Oversee and improve the operations of Workforce Solutions Offices served by the Board

- ✓ Can the Board provide documentation demonstrating that it has policies in place to address service improvement, such as the initiation of performance improvement or service improvement plans when performance issues are identified with the local contractor?

☒ Yes ☐ No

- WSA's Sanction Policy describes the process for initiating service improvement plans to address performance and service- or contractual-related issues.
- WSA's Monitoring Policy describes the process for initiating service improvements to address contractor monitoring issues.

- ✓ Has the Board applied its service improvement policy when necessary?

☒ Yes ☐ No

- WSA has implemented service improvement plans for performance and monitoring issues with our contractors. Some examples include:
 - WIOA performance measures (MPR).
 - WSA has a "Tracker" and implements Informal Monitoring Reviews, staff training, and procedural reviews for attributes with less than a 90% accuracy rate for all grants.

Manage the contractor's performance across multiple Board Programs

- ✓ Does the Board hold performance oversight meetings, do performance reviews, or during its regularly scheduled meetings include a review of its status on contracted performance measures at least 4 times throughout the year?

☒ Yes ☐ No

- The Board reviews performance regularly (fifteen times a year). The Oversight Committee, the Executive Committee, and the Full Board of Directors review program performance.
- Board Staff hold monthly meetings with subrecipients to discuss program performance and provide technical assistance to strengthen service delivery.

Community Impact Statement

At Workforce Solutions Alamo, our work focuses on preparing people for meaningful careers while developing innovative workforce solutions for businesses in targeted industries, providing long-term stability through high-growth, high-wage employment opportunities. Our core values set the foundation from which we serve and help guide our decisions to empower job seekers, support employers, and uplift communities. We are committed to addressing our region's most pressing workforce development challenges. We aim to accelerate economic growth and success in the Alamo Area by remaining true to these values.

- **Mission:** To strengthen the Alamo regional economy by growing and connecting talent pipelines to employers.
- **Vision Statement:** To lead the most integrated community workforce network in the nation.
- **Core Values:** Accountability / Collaboration / Excellence / Innovation / Integrity

Sector-Based Model

WSA's strategies focus on centering workforce development services within a sector-based model. By targeting key industries, such as Aerospace, IT and Cybersecurity, Manufacturing and Trades, Healthcare, Logistics and Warehousing, Construction, Finance, and Business/Customer Service and Administration, WSA effectively narrows the gap between local demand and local talent pipelines. The following is an impact summary of Workforce Solutions Alamo services in the 13 counties we proudly serve.

Overview

During Fiscal Year 2025, Workforce Solutions Alamo demonstrated exceptional reach and impact across the Alamo region, serving as a critical connector between job seekers and employers while strengthening the regional economy. The organization registered 66,079 new

job seekers and welcomed 270 new employer partners, significantly expanding the network of individuals and businesses engaged in workforce development activities. Through comprehensive service delivery, the organization provided 166,836 individual services to 29,147 unique participants throughout the full fiscal year, with each individual receiving an average of 5.7 services tailored to their employment needs. These services ranged from self-service job search assistance and resume preparation to skills assessments and job placement support, ensuring participants received holistic support throughout their career journey. Notably, 3,640 individuals remained engaged across both halves of the fiscal year, demonstrating sustained participation in workforce development programs.

The organization's job fair program proved particularly effective in creating direct connections between employers and job seekers. Throughout the fiscal year, Workforce Solutions Alamo hosted job fairs that attracted 662 employers offering 2,432 job openings to the region. These events facilitated 5,376 interviews between job seekers and hiring companies, resulting in 230 confirmed hires and providing critical face-to-face networking opportunities for thousands of participants. The organization delivered 90 distinct service types to participants, with the most utilized services including self-service job search assistance (9,674 instances), job search and placement assistance (9,123), application support (7,145), skills assessments (6,412), resume preparation (4,838), and job readiness training (3,980), demonstrating the breadth and depth of support available to meet diverse workforce development needs.

The Alamo region's labor market context underscores the importance of these interventions. As of July 2025, the region maintained a labor force of 1,428,104 individuals with an unemployment rate of 3.9%. Workforce Solutions Alamo's comprehensive approach—combining immediate job search assistance, skills training, employer engagement, and supportive services—addresses both short-term employment needs and long-term workforce development goals. By connecting tens of thousands of job seekers with employment resources and building partnerships with hundreds of employers, the organization continues to serve as an essential bridge between talent and opportunity, strengthening the economic vitality and competitiveness of the entire Alamo region.

Child Care Services

Child Care is more than just a service; it is a critical component of our society's infrastructure. It plays a pivotal role in supporting our current workforce and nurturing the future generation. By ensuring children are ready to succeed in school and life, quality Child Care strengthens our community and economy.

In the recent fiscal year 2025, WSA invested approximately \$120M to cover the cost of Child Care for families working or pursuing education.

Building a Network of Quality

WSA recognizes that child care quality links directly to provider quality. To support these dedicated professionals, WSA invested an additional \$8M in various initiatives, including:

- **Texas Rising Star Mentorship:** Mentorship and guidance to child care centers seeking Texas Rising Star certification.
- **Provider Support:** Investing in resources like classroom materials, curriculum, assessments, and professional development.
- **Financial Incentives:** Offering retention grant opportunities to encourage providers to maintain high standards of care and pursue continuous improvement.
- **Business Coaching:** Using TWC QIA funding, we designed the coaching to offer essential supports tailored to meet provider business needs, including: resource connections, one-on-one coaching, needs analysis, networking facilitation, and training and technical assistance.
- **Cohort Model:** Our cohort model has proven to be a powerful tool in fostering a community of excellence among providers. By bringing together centers at various stages of their journey toward Texas Rising Star certification, WSA creates a supportive environment for learning, collaboration, and shared best practices.
- **Scholarships:** For fiscal year 2025, WSA provided scholarships to an average of 14,813 children daily.
- **Economic Impact:** Working parents' earnings from childcare scholarships totaled approximately \$245M.

Strategic Regional Impact

WSA's strategic regional goals aim to expand the workforce development customer base by leveraging unique knowledge and resources. To that effect, WSA's community impact promotes TWC's statewide goals of service optimizers, Texas talent experts, and partnership managers.

- **Alamo Workforce Consortium:** WSA's expansion begins by building partnerships. To better address the continued uncertainties presented in 2021, WSA sought to strengthen and build upon existing partnerships while leveraging and elevating the services offered by these community partners. Workforce Solutions Alamo developed a Consortium of strategic partners focused on improving the regional economy by connecting talent pipelines to employers. Consortium partners include the San Antonio Food Bank, Texas A&M San Antonio, Chrysalis Ministries, YWCA, Family Service Association, AVANCE San Antonio, United Way of San Antonio, Bexar County, and Opportunity Home. The collective impact of the Consortium engages an additional 6,000 clients and recruits them into the workforce ecosystem by removing self-sufficiency barriers through education, training, and employment. Collectively, the Consortium will expand the reach of individual agencies and increase access to financial literacy, housing, food, childcare, and quality education and training. The Consortium offers an efficient referral process that further promotes leveraging by reducing duplication of services. Clients can enroll in education and training to prepare for high-growth, high-wage occupations and industries while receiving the support needed to successfully reach their career goals, while employers receive the benefit of a robust workforce to support business demands.

With our partnerships, WSA leverages substantial non-federal resources (and some federal) to expand our customer base and make a long-lasting impact:

- **TX FAME:** WSA applied and was selected as a TX FAME Hub agency for FAME USA. This is an educational program that promotes STEM and Advanced Manufacturing career pathways. As a TX FAME Hub, WSA positions itself with sixteen manufacturing employers and a FAME USA network that fosters job growth.
- **Pathways to Infrastructure:** The Pathways to Infrastructure grant promotes employer education and supports workforce needs by offering resources to increase employment for job seekers. This DOL funding includes a nine-month planning stage to seamlessly incorporate the program with other funding opportunities.
- **Partners in Reentry Opportunity in Workforce Development:** The Board is one of seven to receive the PROWD grant. Through this project, WSA will collaborate with the local residential reentry center and enroll individuals in education and training to prepare for their exiting incarceration.
- **Childcare Grants:** In childcare, our board has received over \$359,000 to provide peer to peer coaching for child care Directors that on are their journey to certification, material, curriculum, professional development and materials/equipment for child care programs to support an inclusive environment, and to purchase banners and provide professional development and team building for Alamo Quality Pathways partners.
- **Child Care Match Dollars:** With the City of San Antonio's historical matching, WSA increases the availability of child care services by \$7,584,186, substantially broadening our reach.
- **Military to Civilian:** Workforce Solutions Alamo operates within a unique 13-county region that is home to five military bases. This concentration of military installations has created a growing demand for services that support individuals who are currently serving, transitioning to civilian life, or retired from the armed forces. In response, WSA applied for and was awarded the Military to Civilian Grant. The goal of this initiative is to honor and support our former service members by providing opportunities for upskilling, career advancement, and meaningful employment.
- **Ready to Work:** A consortium of WSA and additional local community-based partners entered a contract with the City of San Antonio to provide job training and employment services. The initial contract adds approximately \$62,163,075 to WSA, with an estimated \$59,290,162 as pass-through to our community partners over three years. The funding derives from a 1/8 cent sales tax collected through May 2025. Performance measures include training completion (credentials), employment (job gain), and wages (\$15.00 per hour), which directly promote WSA's and the Texas Workforce Commission's strategic and performance goals. WSA and Consortium partners have enrolled 9,625 job seekers, with 6,450 participating in training and 1,595 securing employment with average wages of \$20.18 in key talent pipelines, including Healthcare, IT/Cyber Security, Construction, Finance, Education, and Manufacturing.
- **Finish Line Grant:** Toyota Foundation donated the Finish Line Grant, approximately \$100K dollars, to the San Antonio Area Foundation for Ready to Work participants who provide proof of employment.

Workforce Academy Ambassador Program

With an initial funding of \$100,000.00 from the San Antonio Area Foundation, WSA created a Workforce Academy Ambassador Program. The grant advances equity and economic mobility through workforce development services by educating individuals in partner organizations within

the 13-County Alamo region. The initiative translates the numerous existing workforce activities into a concise and accessible curriculum to help organizations and individuals better understand and share the services we provide to clients and what career opportunities and jobs are available. Individuals participate in three sessions, including Workforce 101, Workforce Programs, and Workforce Business Services. We provide individuals with a toolkit, program information, and the knowledge to carry out our mission. Ambassadors play a vital role in connecting people to resources and programs that can assist them in starting or furthering their careers in growing industries. The Academy drives conversations and educates individuals about workforce development, helps expand our outreach, increases our ability to graduate ambassadors, and broadens brand awareness. Approximately 420 Workforce Ambassadors support WSA's mission by disseminating resource information, recruiting program participants, and identifying workforce development needs.

Conclusion

Our mission, vision, and core values embody the transformative spirit of “work” and hold us to the highest standards of serving. By remaining centered on this work and through a collaborative approach to meet and exceed the needs of our communities, the investments we make today will enable those we serve to thrive and realize this same promise for generations to come.



MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented By: Victoria Rodriguez, Director of Workforce Services

Date: November 20, 2025

Subject: **Program Briefing**

Summary: During the first quarter, workforce services staff demonstrated meaningful progress. The team obtained the National Dislocated Worker Grant and enrolled twenty-one clients through the Military to Civilian initiative. Their accomplishments strengthen regional workforce development and veteran transition efforts.

Special Grants & Other Initiatives:

National Dislocated Worker Grant: The Workforce Innovation and Opportunity Act (WIOA) National Dislocated Worker Grant (DWG) will provide funding to assist individuals affected by the historic flooding that occurred in July 2025. Kerr and Kendall counties, within the Alamo Workforce Development Board area, have been designated as eligible for Public Assistance under FEMA Disaster Declaration DR-4879-TX for severe storms, straight-line winds, and flooding. Authorized under Section 170 of WIOA, DWGs are discretionary grants awarded by the U.S. Secretary of Labor to deliver employment-related services to dislocated workers and other eligible individuals. The Disaster Recovery DWG supports communities in rebuilding a resilient workforce capable of responding to future disaster events. Grant recipients are expected to actively coordinate with FEMA and state emergency officials to ensure workforce development activities align with broader disaster recovery efforts.

Military to Civilian Employment: Military to Civilian (MTC) initiative focuses on helping service members and veterans successfully transition into the civilian workforce. It provides comprehensive career services, training opportunities, and wraparound support designed to help transitioning service members (TSMs) and recently separated veterans (RSVs) translate their military experience into marketable civilian skills. The Board will deliver enhanced job search assistance, skills assessments, labor market information, résumé development, and interview preparation. When funding allows, the program will also support training in high-demand occupations identified by the Board and listed on the Eligible Training Provider System (ETPS).

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Fiscal Impact: Investments in special projects and initiatives have historically yielded a high return on investment across the 13-county region. The completion of these projects will highlight their impact and ROI in these memos.

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

Next Steps: Continue collaborating with staff, partners, the board, and TWC to enhance and optimize the services offered through the initiatives mentioned above.



MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented By: Victoria Rodriguez, Director of Workforce Services

Date: November 20, 2025

Subject: Performance

Summary: Boards experienced a change in case management system of April 2023, a performance negotiation, performance adjustment, and reporting difficulties due to change in WF CSM. In April 2025, the boards received an additional MPR that covered measures in October, November, and December of 2024. Since then, Alamo has been working towards improving the measures that were unmet and initiated a Technical Assistance Plan (TAP) that took place in May.

Performance: There are fifteen siloed measures tracked across all WIOA programs (Adult, Dislocated Worker, and Youth) in the Monthly Performance Report (MPR) by TWC. These measures include Claimant Re-Employment within 10 Weeks, Employers Receiving Workforce Assistance from Boards or Self-Services, Choices Full Engagement Rate, and the Average Number of Children Served per Day Combined. Each measure has a specific definition outlined in the presentation. Performance targets vary by measure, with some requiring 90% of the target performance to be met and others 95%. WIOA measures have start periods that run either from July to June or January to December, with the End of Year Report concluding in August. Meanwhile, Claimant Re-Employment within 10 Weeks, Employers Receiving Workforce Assistance, Choices Full Engagement Rate, and the Average Number of Children Served per Day Combined follow a rolling start period from the previous month to the current year, with their End of Year Report concluding in September.

The Technical Assistance Plan addresses the following measures:

1. Performance Targets for BCY 2024 End of Year MPR
 - a. Employed Quarter 4 Post Exit- Adult

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- b. Employed Quarter 4 Post Exit- Dislocated Worker
 - c. Credential Rate- Adult
 - d. Credential Rate- Dislocated Worker
 - e. Credential Rate- C&T Participants
2. Performance Targets for BCY 2024 October, November, December
- a. Adult Employed Q4
 - b. Adult Credential
 - c. DW Credential
 - d. C&T Employed Q2
 - e. C&T Credential

The TAP addressed the measures above in May. All measures, but one, have been on a steady improvement. However, in September's MPR, the Claimant Reemployment Measure received a drastic increase of individuals. This has been observed across the state with Alamo seeing as much as twice the historical number.

WIOA Outcome Measures	Status
Employed Q2 Post Exit - Adult (DOL)	MG
Employed Q4 Post Exit - Adult (DOL)	AR
Measurable Skills Gains - Adult (DOL)	NM
Median Earnings Q2 Post Exit - Adult (DOL)	MG
Credential Rate - Adult (DOL)	MG
Employed Q2 Post Exit - DW (DOL)	MG
Employed Q4 Post Exit - DW (DOL)	MG
Measurable Skills Gains - DW (DOL)	NM
Median Earnings Q2 Post Exit - DW (DOL)	MG
Credential Rate - DW (DOL)	NM
Employed/Enrolled Q2 Post Exit - Youth (DOL)	AR
Employed/Enrolled Q4 Post Exit - Youth (DOL)	MG
Measurable Skills Gains - Youth (DOL)	NM
Median Earnings Q2 Post Exit - Youth (DOL)	MG
Credential Rate - Youth (DOL)	MG
Credential Rate - All C&T	NM



Reemployment/Employer Engagement Measures	Status
Claimant Reemployment within 10 Weeks	NM
Employers Receiving Texas Talent Assistance	MG

Fiscal Impact: If TWC decides to impose disciplinary action on the Board, it could have significant consequences on the Board's ability to secure future grant funding. Such actions may result in reduced eligibility for certain funding opportunities, restrictions on grant allocations, or increased oversight in financial and programmatic operations.

Recommendation: Board staff will work closely with contractors to assess current performance levels and identify key areas for improvement. This collaboration will involve analyzing data, reviewing service delivery methods, and implementing strategic adjustments to enhance overall effectiveness. By evaluating necessary steps forward, the Board and contractors will develop targeted action plans aimed at not only meeting but exceeding performance expectations. Additionally, ongoing communication, training, and support will be provided to ensure continuous improvement and sustained success in service delivery.

Next Steps: Continue to monitor the progress of the Technical Assistance Plan (TAP). This plan involves a detailed analysis of unmet performance metrics, strategies, logistics, and service delivery to identify solutions for reaching TWC performance targets. To foster collaboration between contract and board staff, the plan's progress is reviewed every two weeks.



MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented By: Kristen Rodriguez, Director Procurement and Contracts Management

Date: November 20, 2025

Subject: Discussion and Possible Action: Temporary Staffing Services Contract Amendment

Summary: For discussion and potential action: The Workforce Solutions Alamo (WSA) Board of Directors is presented with a contract amendment to increase the budgeted amount for Temporary Staffing by \$112,000 with a new amount of \$612,000 as presented to the board with the Budget approval process.

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

Analysis: Workforce Solutions Alamo (WSA) has identified a need for additional temporary staffing services to meet its personnel requirements for the upcoming fiscal year. Due to WSA's limited resources and funding, the Agency is unable to hire full-time employees. Therefore, the use of temporary staffing resources will help bring in subject matter experts needed to support daily operations.

In June 2024 the board was presented with a proposal to award contracts to MMC Group, LP, Tryfacta, Inc., Integrated Human Capital, Cambay Consulting, LLC, and Compunnel Software Group, Inc. for the purchase of Temporary Staffing Services on an IDIQ (Indefinite Delivery Indefinite Quantity) basis in an estimated amount of \$500,000.00.

The scope of work requires the contractor to expediently source, screen, and provide quality candidates to fill temporary staffing needs for a diverse range of job categories, including, but not limited to:

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Finance/ Accounting
Procurement
Professional/ Management Services
Marketing/ Communications/Public Relations
Facilities
IT Staffing

Alternatives: Any alternative to approving the recommendation may lead to inadequate staffing to handle workload fluctuations, seasonal demands, or special projects. This can result in overburdened permanent staff, decreased productivity, and potentially missed deadlines for various internal departments at WSA that require temporary staffing assistance.

Fiscal Impact: Increased contract amount by \$112,000 brings the new contract amount to \$612,000. The amount paid will depend on the quantity of materials and services procured at the agreed-upon rates. The allocated budget will be distributed among the four (4) selected vendors proportionate to the actual number of resources procured and the agreed-upon markup for each resource.

Recommendation: Procurement & Contracts Management recommends approving the contract amendment for Temporary Staffing Services.

Next Steps: Upon approval, WSA Procurement and Contract Management (PCM), in coordination with WSA Human Resources, will execute the contract amendment of Temporary Staffing Services with the current vendors that were awarded as a result of the RFP.



MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented By: Kristen Rodriguez, Director Procurement and Contracts Management

Date: November 20, 2025

Subject: Fiscal Monitoring Services Contract

Summary: The Workforce Solutions Alamo (WSA) - Board of Directors is presented with a proposal to award a contract to Christine H Nguyen, CPA for Fiscal Monitoring Services in the estimated aggregate amount of \$924,000 over a five (5) year span. The contract term will be effective February 1, 2026, through January 31, 2027, with the option to renew for up to four (4) one-year periods upon written mutual consent of Workforce Solutions Alamo and the selected Contractor.

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

Analysis: A Request for Proposals (RFP) for Fiscal Monitoring Services was published on WSA's Procurement Portal and the Texas Electronic State Business Daily (ESBD) on July 3, 2025, with a submission deadline of September 3, 2025. The selected provider will conduct comprehensive financial monitoring reviews of Workforce Solutions Alamo (WSA) contractors to ensure that these contractors comply with federal, State and WSA's rules and regulations.

The following scope of services of this engagement is to assess and ensure that WSA's contractors have adequate financial and administrative systems in place to manage federal and State programs,

Services will include, but are not limited to:

1. Risk Assessment & Desk Review

- a. Evaluate internal controls and fiscal systems.
- b. Review prior monitoring findings, audit reports, and board minutes.
- c. Assess financial management, procurement, personnel, and property controls.

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2. On-Site Fieldwork

- a. Conduct entrance and exit conferences with WSA and contractors.
- b. Test financial transactions (personnel, non-personnel, and financial aid).
- c. Verify compliance with cost categories, budget allocations, and procurement rules.
- d. Review indirect cost rates, cost allocation plans, and insurance compliance.

3. Fiscal Integrity Review

- a. Assess contractor capacity to comply with state/federal statutes.
- b. Review pending litigation, internal controls, and financial reporting.
- c. Verify safeguarding of assets and fidelity bonding.

4. Reporting

- a. Provide a draft fiscal monitoring report within 15 working days after contractor response.
- b. Submit final reports upon WSA approval, incorporating contractor feedback.
- c. Include findings, effects, and recommendations for improvement.
- d. Maintain all supporting workpapers and documentation.

5. Technical Assistance

- a. Provide fiscal technical support to WSA during TWC Fiscal Monitoring Certification.

By the deadline, WSA received seven (7) proposals, which were then evaluated by internal assessors in accordance with the RFP's specifications and requirements.

Alternatives: Any alternative to not approving the recommendation for Fiscal Monitoring services may result in significant operational and compliance risks for WSA. The Texas Workforce Commission (TWC) requires Boards to conduct annual fiscal monitoring and fiscal integrity reviews of all contracted service providers to ensure compliance with federal and state regulations, including the TWC Financial Manual for Grants and Contracts (FMGC), Uniform Guidance (2 CFR 200), and UGMS.

Fiscal Impact: The contract will begin with an initial one-year term, effective February 1, 2026, through January 31, 2027, and may be extended for up to four (4) additional one-year periods, subject to mutual written agreement by both parties. The total projected expenditure over the potential five-year term is \$924,000, unless modified by a formally executed amendment approved by all parties.



Below is the breakdown of the anticipated costs for the term of the contract:

These amounts are based on the four current subrecipients.

****If additional contractors are selected for monitoring, additional fees may be incurred.**

Recommendation: Staff recommend that the Board of Directors approve the award of the contract for Fiscal Monitoring Services to Christine H Nguyen, CPA., as identified through the competitive Request for Proposals (RFP) process. The contract will be effective February 1, 2026, through January 31, 2027, with the option to renew for up to four (4) additional one-year periods upon mutual agreement. The estimated total expenditure over the potential five-year term is \$924,000. Approval of this recommendation will ensure continued compliance with federal and state audit requirements, maintain timely financial reporting, and support transparency and accountability in WSA's financial operations.

Next Steps: Once this action is approved, WSA Procurement and Contract Management (PCM), in

Item	Feb 26' - Jan 27'	Feb 27' - Jan 28'	Feb 28' - Jan 29'	Feb 29' - Jan 30'	Feb 30' - Jan 31	**Contingency 10%	Contract Total
Estimated Annual Contract Amount	\$168,000	\$168,000	\$168,000	\$168,000	\$168,000	\$84,000	\$924,000

collaboration with the WSA Fiscal Team, will begin negotiations and oversee the execution of contract for Fiscal Monitoring Services with Christine H Nguyen, CPA .

Attachments: RFP 2025-022 Fiscal Monitoring Services

Bid Tabulation



Active Submissions

	Total	Minimum Requirements	A - Quality of Vendor Goods and Services	B - Extent to Which the Goods and Services Meet the Needs of the Organization	C - Price	D - HUB
Supplier	/ 100 pts	Pass/Fail	/ 30 pts	/ 45 pts	/ 20 pts	/ 5 pts
Christine H Nguyen CPA	90.97	Pass	28.67	39.3	18	5
Crowe LLP	86.77	Pass	26.67	35.1	20	5
Martinez Rosario and Company LLP	83.27	Pass	28.67	39.6	10	5
Weaver and Tidwell, L.L.P.	77.93	Pass	26.33	39.6	12	0
Maher Duessel	74.83	Pass	26.33	34.5	14	0
GilFlo Consulting	72.53	Pass	20.33	31.2	16	5



Services, LLC						
LaPorte CPAs & Business Advisors	70.5	Pass	26	31.5	8	5

MEMORANDUM

To: Executive Committee
 From: Adrian Lopez, Chief Executive Officer
 Presented by: Gabriela Navarro Garcia, Controller
 Date: November 20, 2025
 Regarding: **Financial Report – September 30, 2025**

SUMMARY: Financial reports through September 30, 2025, have been prepared for the fiscal year October 1, 2024, through September 30, 2025; the straight-line expenditure benchmark is 100% 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	87.46%	The personnel variance is primarily due to unfilled vacancies during the year, as well as differences in travel and staff development expenses. Additionally, incentive costs are not reflected, as the figures presented are preliminary.
Board Facility	100.84%	The WSA Board facility budget is acceptable and within the budget.
Equipment	88.17%	The equipment variance is considered acceptable, as we are still in the process of finalizing year-end accounts and continue to receive outstanding invoices.
General Office Expense	59.67%	The primary budget surplus is due to the insurance contingency.
Professional Services	65.40%	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	46.09%	The board did not attend any additional board conferences but will continue to track any available conferences that would benefit the board in the following fiscal year.
Total Expense	80.91%	

Corporate expenditure represents 4.18% of overall expenditures, and demonstrating a budget surplus of approximately 19.09% through September 2025.

FACILITIES AND INFRASTRUCTURE BUDGET:

Expenditures	% Expensed	Comments
Overall	95.97%	The facility expenditures represent 3.05% of the overall expenditures and reflecting a 4.03% straight-line budget surplus. This is an acceptable variance.

ACTIVE GRANTS ONLY (TWC):

Grant	End date	Budget	% Expense	Comments
25TAF Temporary Assistance for Needy Families	10/31/2025	\$6,590,722	89.87%	The board continues to closely monitor expenditures to spent all funds by the end of the contract period.
25WOR Rapid Response	06/30/2026	\$51,557	23.55%	Received new grant of \$51,557 for a 12-month period. The board will continue to monitor for any unforeseen layoffs affecting the community for possible request of additional dollars.
25NCP Non-Custodial Parent	09/30/2025	\$437,578	84.12%	The board is expecting to return funds. The expenses are not finalized but estimating at least \$70,000
25WPA Wagner-Peyser Employment Services	12/31/2025	\$667,237	91.70%	The board is nearing the threshold of expenses and is actively exploring options to request additional funding to ensure all costs are adequately covered.
25CCQ – Child Care Quality	10/31/2025	\$4,412,859	86.86%	The board expects to finalize the purchase of supplies and materials for Quality TRS providers and has already allocated some funds in October to ensure the grant funds are fully utilized.

25CQF – CCDF Quality Improvement Activity	10/31/2025	\$4,069,145	89.30%	The Board plans to allocate the remaining funds toward incentive payments in October to ensure full utilization of the grant.
25MTC – Military to Civilian Employment Program	04/30/2026	\$225,085	15.46%	New grant awarded April 21, 2025, for a 12-month period. Expenditures are expected to be reflected in the next fiscal year.
25VR1 - SEAL	09/30/2025	\$900,000	44.18%	TWC reduced the targets from 256 to 128, which reduces the expected utilization of the dollars.

ACTIVE GRANTS ONLY (NON-TWC):

Grant	End date	Budget	% Expense	Comments
DOL Building Pathways	09/30/2029	\$2,000,000	2.77%	Grant received for a 4-year period. Expenditures will start increasing in the next fiscal year.
22RTW	05/31/2025	\$65,554,565	57.43%	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	22%	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 – September, 2025

**Workforce Solutions Alamo
Corporate Expenditure Report
FY 2024 - 2025
as of September 2025**

	Annual Budget	YTD Expenses	% Expensed	Balance
PERSONNEL				
Salaries/Wages	\$ 4,697,557	\$ 4,275,829	91.02%	\$ 421,728
Fringe Benefits	1,357,103	1,063,233	78.35%	293,870
Staff Travel	121,900	88,303	72.44%	33,597
Staff Training & Development	161,000	51,830	32.19%	109,170
<i>PERSONNEL SUBTOTAL:</i>	\$ 6,337,560	\$ 5,479,195	86.46%	\$ 858,365
BOARD FACILITY				
Rent	\$ 449,665	\$ 455,168	101.22%	\$ (5,503)
Storage	\$ 15,000	\$ 13,434	89.56%	\$ 1,566
Maintenance and Repair	7,900	7,943	100.55%	(43)
<i>BOARD FACILITY SUBTOTAL:</i>	\$ 472,565	\$ 476,545	100.84%	\$ (3,980)
EQUIPMENT/RELATED COSTS				
Equipment Purchases	\$ 65,000	\$ 20,735	31.90%	\$ 44,265
Equipment Rental	17,399	14,632	84.10%	2,767
Software Licenses & Maintenance	150,000	169,543	113.03%	(19,543)
<i>EQUIPMENT/RELATED COSTS SUBTOTAL:</i>	\$ 232,399	\$ 204,910	88.17%	\$ 27,489
GENERAL OFFICE EXPENSES				
Communications	\$ 56,470	\$ 46,020	81.49%	\$ 10,450
Advertising	5,000	-	0.00%	5,000
Insurances	250,000	74,295	29.72%	175,705
Office Supplies	25,000	6,258	25.03%	18,742
Postage/Shipping/Other	7,500	2,603	34.71%	4,897
Printing, Binding & Reproduction	15,000	7,974	53.16%	7,026
Publications & Subscriptions	15,000	7,506	50.04%	7,494
Dues	15,000	13,458	89.72%	1,542
Marketing (External)	170,000	157,153	92.44%	12,847
Miscellaneous Costs	20,000	2,358	11.79%	17,642
Non Federal	100,000	87,508	87.51%	12,492
<i>GENERAL OFFICE EXP SUBTOTAL:</i>	\$ 678,970	\$ 405,133	59.67%	\$ 273,837
PROFESSIONAL SERVICES				
Legal Services-Corporate	\$ 125,000	\$ 83,652	66.92%	\$ 41,348
Legal Services-Other	50,000	33,454	66.91%	16,546
Audit	75,000	73,100	97.47%	1,900
Monitoring (Contractor)	450,000	373,707	83.05%	76,293
Professional Services	1,200,000	673,006	56.08%	526,994
Payroll Fees	50,000	38,309	76.62%	11,691
<i>PROFESSIONAL SERVICES SUBTOTAL:</i>	\$ 1,950,000	\$ 1,275,227	65.40%	\$ 674,773
BOARD EXPENSES				
Board Member Travel	\$ 15,000	\$ 7,241	48.27%	\$ 7,759
Board Member Training/Development	20,000	4,500	22.50%	15,500
Board Meetings & Misc. Costs	10,000	9,000	90.00%	1,000
<i>BOARD EXPENSES SUBTOTAL:</i>	\$ 45,000	\$ 20,741	46.09%	\$ 24,259
TOTAL EXPENSES	\$ 9,716,494	\$ 7,861,751	80.91%	\$ 1,854,743
SUMMARY:				
Personnel	\$ 6,337,560	\$ 5,479,195	86.46%	\$ 858,365
Board Facility	472,565	476,545	100.84%	(3,980)
Equipment/Related Costs	232,399	204,910	88.17%	27,489
General Office Expenses	678,970	405,133	59.67%	273,837
Professional Services	1,950,000	1,275,227	65.40%	674,773
Board Expenses	45,000	20,741	46.09%	24,259
TOTAL CORPORATE EXPENSES	\$ 9,716,494	\$ 7,861,751	80.91%	\$ 1,854,743

Workforce Solutions Alamo
Facilities & Infrastructure Report
FY 2024 - 2025
as of September 2025

Facilities & Infrastructure	Annual Budget	Budget Amendment #1	YTD Expenses	% Expensed	Balance
Workforce Facilities	\$ 6,452,970	\$ 5,983,010	\$ 5,741,923	95.97%	\$ 241,087
TOTAL FACILITIES EXPENSES	\$ 6,452,970	\$ 5,983,010	\$ 5,741,923	95.97%	\$ 241,087

Facilities	End of Lease	Note	Facilities	End of Lease	Note
Port SA	4/30/2034		S. Flores	7/31/2028	
O'Connor	10/5/2034		Kerville	4/30/2029	
Pearsall	3/31/2030		Datapoint	3/31/2030	
Hondo	12/31/2027		Datapoint - Child Care	3/31/2030	
SA Foodbank	12/31/2025		E. Houston	8/16/2030	
Kenedy	1/31/2027		New Braunfels	1/31/2032	
Pleasanton	1/31/2028		Bandera	1/14/2028	
Floresville	7/31/2026				
Boerne	11/30/2026				
Seguin	1/15/2027				

Workforce Solutions Alamo
Grant Summary Report
FY 2024 - 2025
as of September 2025

Grant	Grant Awards	Remaining Balance as 9/30/24	Revised FY25 Budget	Expenses FY 24 - 25	Total Grant Expenses	Grant Balance	Grant Expended	Months Remaining
2023 WIOA ADULT SERVICES	\$ 5,522,731.00	\$ 2,514.79	\$ 2,514.79	\$ 2,792.50	\$ 5,523,008.71	\$ (277.71)	100.01%	
2024 WIOA ADULT SERVICES	\$ 5,576,777.00	\$ 5,407,680.97	\$ 5,407,680.97	\$ 4,241,150.72	\$ 4,410,246.75	\$ 1,166,530.25	79.08%	9
2025 WIOA ADULT SERVICES	\$ 4,836,736.00	\$ -	\$ -	\$ -	\$ -	\$ 1,107,411.00	0.00%	21
2023 WIOA DISLOCATED WORKER	\$ 4,774,833.00	\$ 866,476.89	\$ 866,476.89	\$ 866,625.22	\$ 4,774,981.33	\$ (148.33)	100.00%	
2024 WIOA DISLOCATED WORKER	\$ 4,670,305.00	\$ 4,670,305.00	\$ 4,670,305.00	\$ 3,017,765.49	\$ 3,017,765.49	\$ 1,652,539.51	64.62%	9
2025 WIOA DISLOCATED WORKER	\$ 4,111,151.00	\$ -	\$ -	\$ -	\$ -	\$ 1,001,187.00	0.00%	21
2023 WIOA YOUTH SERVICES	\$ 5,861,245.00	\$ 871,793.58	\$ 871,793.58	\$ 872,105.21	\$ 5,861,556.63	\$ (311.63)	100.01%	
2024 WIOA YOUTH SERVICES	\$ 5,910,587.00	\$ 5,550,976.46	\$ 5,550,976.46	\$ 3,848,943.99	\$ 4,208,554.53	\$ 1,702,032.47	71.20%	9
2025 WIOA YOUTH SERVICES	\$ 5,087,523.00	\$ -	\$ -	\$ 266,305.16	\$ 266,305.16	\$ 4,821,217.84	5.23%	21
WIOA RAPID RESPONSE	\$ 58,320.00	\$ 32,403.59	\$ 32,403.59	\$ 32,192.41	\$ 58,108.82	\$ 211.18	99.64%	
WIOA RAPID RESPONSE	\$ 51,557.00	\$ -	\$ 4,952.41	\$ 12,144.05	\$ 12,144.05	\$ 39,412.95	23.55%	9
TEMPORARY ASST FOR NEEDY FAMILIES-TANF	\$ 6,851,831.00	\$ (219.41)	\$ -	\$ 0	\$ 6,852,050.41	\$ (219.41)	100.00%	
TEMPORARY ASST FOR NEEDY FAMILIES-TANF	\$ 6,590,722.00	\$ -	\$ 6,590,722.00	\$ 5,923,363.17	\$ 5,923,363.17	\$ 667,358.83	89.87%	1
SUPPLEMENTAL NUTRITION ASST PRGRM - SNAP	\$ 945,544.00	\$ -	\$ 945,544.00	\$ 920,926.10	\$ 920,926.10	\$ 24,617.90	97.40%	
SUPPLEMENTAL NUTRITION ASST PRGRM - SNAP	\$ 513,000.00	\$ -	\$ 513,000.00	\$ 483,146.90	\$ 483,146.90	\$ 29,853.10	94.18%	
NON CUSTODIAL PARENT	\$ 437,578.00	\$ 432,269.85	\$ 432,269.85	\$ 362,791.85	\$ 368,100.00	\$ 69,478.00	84.12%	
NON CUSTODIAL PARENT	\$ 437,578.00	\$ -	\$ 31,724.41	\$ 2,363.15	\$ 2,363.15	\$ 435,214.85	0.54%	12
CC SRVCS FORMULA ALLOCATION-CCF	\$ 103,860,758.00	\$ 1,193,418.23	\$ 1,193,418.23	\$ 1,194,089.38	\$ 103,861,429.15	\$ (671.15)	100.00%	
CC SRVCS FORMULA ALLOCATION-CCF	\$ 125,506,409.00	\$ -	\$ 120,566,722.00	\$ 120,567,699.30	\$ 120,567,699.30	\$ 4,938,709.70	96.06%	3
CC DVLPMNT FUND LOCAL MATCH - CCM	\$ 7,584,186.00	\$ 7,584,186.00	\$ 7,584,186.00	\$ 7,584,186.00	\$ 7,584,186.00	\$ -	100.00%	
CC DVLPMNT FUND LOCAL MATCH - CCM	\$ 7,595,230.00	\$ -	\$ 7,595,230.00	\$ 1,528,216.14	\$ 1,528,216.14	\$ 6,067,013.86	20.12%	3
CC TEXAS DEPT FAMILY PROTECTIVE SRVCS-CCP	\$ 7,657,313.93	\$ 30,041.12		\$ 0	\$ 7,627,272.81	\$ 30,041.12	99.61%	
CC TEXAS DEPT FAMILY PROTECTIVE SRVCS-CCP	\$ 8,963,129.00	\$ 8,365,211.12	\$ 8,109,320.83	\$ 7,928,954.36	\$ 8,526,872.24	\$ 436,256.76	95.13%	3
CC TEXAS DEPT FAMILY PROTECTIVE SRVCS-CCP	\$ 8,722,082.00	\$ -	\$ 507,207.81	\$ 507,207.81	\$ 507,207.81	\$ 8,214,874.19	5.82%	15
TRADE ACT SERVICES	\$ 5,000.00	\$ -	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ -	100.00%	
WAGNER-PEYSER EMPLOYMENT SERVICES-WPA	\$ 1,017,695.00	\$ 275,281.21	\$ 275,281.21	\$ 275,306.35	\$ 1,017,720.14	\$ (25.14)	100.00%	
WAGNER-PEYSER EMPLOYMENT SERVICES-WPA	\$ 667,237.00	\$ -	\$ 523,317.00	\$ 611,863.09	\$ 611,863.09	\$ 55,373.91	91.70%	3
RESOURCE ADMIN GRANT	\$ 11,857.00	\$ -	\$ 11,857.00	\$ 11,327.82	\$ 11,327.82	\$ 529.18	95.54%	
TEXAS VETERANS COMMISSION	\$ 255,178.00	\$ -	\$ 255,178.00	\$ 255,116.52	\$ 255,116.52	\$ 61.48	99.98%	

Workforce Solutions Alamo
Grant Summary Report
FY 2024 - 2025
as of September 2025

Grant	Grant Awards	Remaining		Revised FY25 Budget	Expenses FY 24 - 25	Total Grant		Grant Balance	Grant Expended	Months Remaining
		Balance as 9/30/24				Expenses				
CC QUALITY - CCQ	\$ 6,249,935.30	\$ 848,602.72	\$	848,602.72	\$ 622,625.14	\$ 6,023,957.72	\$	225,977.58	96.38%	
CC QUALITY - CCQ	\$ 4,412,859.00	\$ -	\$	4,412,859.00	\$ 3,832,991.56	\$ 3,832,991.56	\$	579,867.44	86.86%	1
QUALITY IMPROVEMENT ACTIVITY	\$ 4,069,145.00	\$ -	\$	4,069,145.00	\$ 3,633,850.19	\$ 3,633,850.19	\$	435,294.81	89.30%	1
WORKFORCE COMMISSION INITIATIVES	\$ 100,250.00	\$ -	\$	100,250.00	\$ 100,096.57	\$ 100,096.57	\$	153.43	99.85%	
REEMPLOYMENT SERVICES - REA	\$ 1,057,573.00	\$ 212,963.05	\$	212,963.05	\$ 212,987.24	\$ 1,057,597.19	\$	(24.19)	100.00%	
REEMPLOYMENT SERVICES - REA	\$ 1,628,778.00	\$ -	\$	1,446,281.00	\$ 1,354,182.95	\$ 1,354,182.95	\$	274,595.05	83.14%	5
PARTNERS FOR REENTRY OPPORTUNITIES IN WD (PROWD)	\$ 1,174,500.00	\$ 1,136,951.80	\$	387,507.23	\$ 416,306.48	\$ 453,854.68	\$	720,645.32	38.64%	24
MILITARY FAMILY SUPPORT PROGRAM	\$ 221,896.00	\$ 40,522.48	\$	40,522.48	\$ 39,899.59	\$ 221,273.11	\$	622.89	99.72%	
MILITARY TO CIVILIAN EMPLOYMENT PROGRAM	\$ 225,085.00	\$ -	\$	100,448.00	\$ 34,793.19	\$ 34,793.19	\$	190,291.81	15.46%	7
TEACHER EXTERNSHIP	\$ 200,000.00	\$ -	\$	200,000.00	\$ 145,175.17	\$ 145,175.17	\$	54,824.83	72.59%	6
STUDENT HIREABILITY NAVIIGATOR	\$ 210,000.00	\$ 193,920.80	\$	193,920.80	\$ 155,404.76	\$ 171,483.96	\$	38,516.04	81.66%	
STUDENT HIREABILITY NAVIIGATOR	\$ 210,000.00	\$ -	\$	16,079.00	\$ 20,841.64	\$ 20,841.64	\$	189,158.36	9.92%	11
VOCATIONAL REHABILITATION-VR INFRA SPPRT	\$ 826,245.98	\$ 783,331.90	\$	779,694.25	\$ 578,092.41	\$ 621,006.49	\$	205,239.49	75.16%	
VOCATIONAL REHABILITATION-VR INFRA SPPRT	\$ 798,861.23	\$ -	\$	62,443.79	\$ 62,443.79	\$ 62,443.79	\$	736,417.44	7.82%	11
PAID WORK EXPERIENCE (PWE)	\$ 187,500.00	\$ -	\$	187,500.00	0	0	\$	187,500.00	0.00%	
TRAINING & EMPLOYMENT NAVIGATOR PILOT	\$ 195,856.00	\$ 146,055.46	\$	146,055.46	\$ 104,863.28	\$ 154,663.82	\$	41,192.18	78.97%	1
SUMMER EARN & LEARN (SEAL)	\$ 900,000.00	\$ -	\$	900,000.00	\$ 397,585.55	\$ 397,585.55	\$	502,414.45	44.18%	
SAN ANTONIO AREA FOUNDATION-WORKFORCE ACADEMY	\$ 100,000.00	\$ 21,298.59	\$	21,298.59	\$ 16,683.17	\$ 95,384.58	\$	4,615.42	95.38%	
SAN ANTONIO AREA FOUNDATION-CAPACITY BUILDING	\$ 37,500.00	\$ 15,710.45	\$	15,710.45	0	\$ 21,789.55	\$	15,710.45	58.11%	
ADAM SCRIPPS FOUNDATION FUND	\$ 187,500.00	\$ 175,633.00	\$	175,633.00	\$ 8,375.34	\$ 20,242.34	\$	167,257.66	10.80%	1
KRONKOWSKY FOUNDATION FUND	\$ 21,000.00	\$ 14,630.59	\$	14,630.59	\$ 2,510.04	\$ 8,879.45	\$	12,120.55	42.28%	
TOYOTETSU PILOT PROGRAM (RTW)	\$ 16,100.00	\$ 15,000.00	\$	15,000.00	\$ 13,650.00	\$ 14,750.00	\$	1,350.00	91.61%	
READY TO WORK-COSA	\$ 65,554,565.00	\$ 40,196,337.05	\$	20,412,882.85	\$ 12,289,701.73	\$ 37,647,929.68	\$	27,906,635.32	57.43%	
READY TO WORK-COSA	\$ 11,114,758.14	\$ 11,114,758.14	\$	3,704,919.38	\$ 2,445,079.07	\$ 2,445,079.07	\$	8,669,679.07	22.00%	8
DOL BUILDING PATHWAYS	\$ 2,000,000.00	\$ -	\$	400,000.00	\$ 55,311.92	\$ 55,311.92	\$	1,944,688.08	2.77%	49
TEXAS MUTUAL INS COMPANY CHARITABLE GRANT	\$ 100,000.00	\$ -	\$	100,000.00	\$ 98,632.36	\$ 98,632.36	\$	1,367.64	98.63%	1
TEXAS MUTUAL INS COMPANY CHARITABLE GRANT	\$ 62,500.00	\$ -	\$	-	0	0	\$	62,500.00	0.00%	13
LIFT FUND	\$ 3,600.00	\$ -	\$	3,600.00	\$ 1,651.34	\$ 1,651.34	\$	1,948.66	45.87%	
RESTORE EDUCATION	\$ 95,000.00	\$ -	\$	95,000.00	\$ 24,681.20	\$ 24,681.20	\$	70,318.80	25.98%	
GRAND TOTAL	\$ 436,045,100.58	\$ 90,198,055.43	\$	211,610,028.67	\$ 187,989,998.37	\$ 353,506,661.29	\$	75,699,150.29		

MEMORANDUM

To: Executive Committee
From: Adrian Lopez, Chief Executive Officer
Presented by: Gabriela Navarro Garcia, Controller
Date: November 20, 2025
Regarding: **Financial Monitoring & Single Audit Reviews**

SUMMARY: *Update and Possible Discussion on Financial Monitoring & Single Audit Reviews for Subrecipients.* Federal and State legislation and policies require recipients of federal funds to conduct a financial evaluation of the application of these funds on at least an annual basis. Properly conducted financial evaluations measure:

- The degree of compliance with applicable laws, regulations, policies, and procedures.
- Adequacy of management controls.
- Reliable information is captured, reported, and used to improve decision-making.
- Resources are efficiently, effectively used, and protected from waste, fraud, and abuse.
- Past, current, and projected effectiveness and efficiency of program administration.

Additionally, the Texas Workforce Commission's Financial Manual for Grants and Contracts (FMGC) requires boards to complete an annual single audit desk review before executing a contract renewal. The reviews were conducted by Christine Nguyen, CPA.

ANALYSIS: The Financial Monitoring reports for C2 GPS and SERCO have been completed and closed for FY 24-25. The reports outlined any concerns Ms. Nguyen discovered during the review. The subrecipients had the opportunity to provide supporting documentation and/or respond to the observations and findings. The following items for each subrecipient were notated in the review.

SERCO – Youth Services

- I. Audit
 - a. The Annual Financial and Compliance Report in Accordance with the CFR Part 200 Uniform administrative requirements audit report for the period ending June 30, 2024 was reviewed. No issues were identified.
- II. Cash Management
 - a. No issues were identified.
- III. Cost Allocation
 - a. No exceptions were identified.

- IV. Expenditure Disbursement – Personnel Costs
 - a. No exceptions were found.
- V. Expenditure Disbursement – Staff Incentives
 - a. No exceptions were found.
- VI. Expenditure Disbursement – Maximum Salary Limitations
 - a. No exceptions were found.
- VII. Expenditure Disbursement – Non-Personnel Costs
 - a. The support documentation has not demonstrated that SERCO’s procurement solicitation complied with the TWC FMGC, Chapter 14, Procurement for IT services. SERCO utilized the small purchase method.
 - b. Two travel costs resulted in disallowed costs.
 - c. Telephone charges for international calls were charged to WSA.
- VIII. Education and Training
 - a. Three transactions did not have monthly contact with the customers.
- IX. Work Experience
 - a. Information on internal forms was not consistent with actual payrates, date of employment, and funding streams for seven (7) transactions.
- X. Support Services – Transportation
 - a. No evidence of ISS forms.
 - b. No evidence of Budget/Financial Assessment forms.
- XI. Support Services
 - i. No exceptions were found.
- XII. Customer Incentives
 - a. No exceptions were found,
- XIII. Financial and Other Reporting
 - a. For the FY25 project-to-date through February 2025 invoices: the budget amounts were not consistent with approved budgets.
- XIV. Insurance
 - a. No exceptions were found.

C2GPS – Adult Services

- I. Audit
 - a. The Annual Financial and Compliance Report in Accordance with the CFR Part 200 Uniform administrative requirements audit report for the period ending September 30, 2023 was reviewed. No issues were identified.
- II. Cash Management
 - a. No issues were identified.
- III. Cost Allocation
 - a. No exceptions were found.

- IV. Expenditure Disbursements – Personnel Costs
 - a. Timesheets – forty-six (46) employees’ timesheets were sampled. No exceptions were found.
 - b. Staff Incentives – One (1) payment was selected for review. Expense should have been charged to C2 Corporate. Amount to reimburse WSA is \$280.82 (Incentive-\$250, Social Security & Medicare-\$19.13, W/C-\$.27, 401(K)-\$11.42) plus \$28.08 Indirect Costs, total \$308.90
- V. Expenditure Disbursements – Non-Personnel Costs
 - a. No exceptions were identified.
- VI. Expenditure Disbursements – Support Services Transportation
 - a. No exceptions were identified.
- VII. Expenditure Disbursements - Support Services Other
 - a. No exceptions were identified.
- VIII. Expenditure Disbursements – Customer’s Incentive Other
 - a. Twenty (20) customer incentives were selected. The Pre-paid Disbursement Form indicates 60 days retention instead of 90 days. C2 has concurred. Further response is not required.
- IX. Expenditure Disbursements – Work Experience
 - a. Twenty-five (25) timesheets were selected. One timesheet did not have employee signature and supervisor’s approval.
- X. Financial and Other Reporting
 - a. No issues were identified.
- XI. Insurance
 - a. C2GPS is in compliance with the requirements.

FISCAL IMPACT: The board has received payments for disallowed costs that were identified in the review.

ATTACHMENTS:

Financial Monitoring Report for C2GPS
Financial Monitoring Report for SERCO



September 15, 2025

Ms. Eva G. Dewaelsche
President & CEO
SERCO of Texas, Inc.
9301 Michigan Ave.
Detroit, MI 48210

Dear Ms. Garza Dewaelsche,

Federal and State legislation and policies require recipients of federal and state funds to conduct a financial evaluation of the application of such funds on at least an annual basis. To that purpose, Workforce Solutions Alamo (WSA), with the assistance of Ms. Christine Nguyen, CPA, has completed a *Financial Compliance Monitoring Report*, dated August 5, 2025, of SERCO for Texas, Inc. (SERCO) its capacity to deliver WIOA Youth workforce services for Workforce Solutions Alamo (WSA) from June 1, 2024, through February 28, 2025.

The report and related attachments provide the results of the financial evaluation and identify the following areas that require resolution:

1. Expenditure Disbursements

A. NON-PERSONNEL COSTS FINDINGS:

1. The support documentation did not demonstrate that SERCO's procurement solicitation complied with the TWC FMGC, Chapter 14, Procurement for IT services. SERCO utilized the small purchase method.
Resolution: SERCO has provided two agency-wide Check Registers (one file) for all payments to Spryder Technologies LLC, the vendor in question. For both FY24 and FY25 the total amount of expenses was well below the \$250,000 threshold requiring a competitive procurement. ***Item resolved.***
2. Two travel costs resulted in disallowed costs.
Resolution: SERCO concurs with the two travel costs that have been stipulated as disallowed. ***SERCO will process a payment to WSA in the amount of \$148.42.***
3. Telephone charges for international calls were charged to WSA.
Resolution: SERCO agrees that the roaming charges incurred by the employee while actively working in the DR are over necessary expenses. ***SERCO will process a payment to WSA in the amount of \$117.06***

B. SUPPORT SERVICES – TRANSPORTATION:

1. No evidence of ISS forms and Budget/Financial Assessment forms.
Resolution: Serco has provided the requested documents. ***Item resolved***

This letter confirms Financial Compliance Monitoring Report of SERCO for Texas, Inc. the period from June 1, 2024, through February 28, 2025, as closed.

Again, we appreciate your staff's cooperation and assistance throughout the review and their outstanding efforts in successfully offering services to Youth in our communities.

Please contact Gabriela Navarro Garcia, Controller, if you have questions or need further assistance.

Sincerely,

DocuSigned by:

A8660FAA8A94453...

Adrian Lopez
Chief Executive Officer

cc: Esmeralda Apolinar Ramirez, WSA Interim Director of Finance and Accounting;
Gabriela Navarro Garcia, WSA Controller;
Manuel Urges, SERCO Regional Director
Gabriela Horbach, SERCO Project Director
Roberto Corral, SERCO Operations Manager
Eva G. Dewaelsche, SERCO President & CEO

**WORKFORCE SOLUTIONS ALAMO
SERCO OF TEXAS, INC.
FINANCIAL COMPLIANCE MONITORING REPORT
JUNE 1, 2024 THROUGH FEBRUARY 28, 2025
REPORT #: 24-25-WSA-SERCO-FINANCIAL-06
REPORT DATE: AUGUST 5, 2025**

CHRISTINE H. NGUYEN

CERTIFIED PUBLIC ACCOUNTANT

4771 Sweetwater Blvd., 195

Sugar Land, TX 77479

(832) 215-9696

INTRODUCTION

Federal and State legislation and policies require recipients of federal funds to conduct a financial evaluation of the application of these funds on at least an annual basis.

Properly conducted financial evaluations measure:

- The degree of compliance with applicable laws, regulations, policies, and procedures.
- Adequacy of management controls.
- Reliable information is captured, reported, and used to improve decision-making.
- Resources are efficiently and effectively used and protected from waste, fraud, and abuse.
- Past, current, and projected effectiveness and efficiency of program administration.
- Financial and program performance relevant to organizational goals.

This report provides the results of the financial evaluation for:

1. SERCO for Texas, LLC (SERCO) in its capacity to deliver Youth workforce services for Workforce Solutions Alamo (WSA) for the period from June 1, 2024 through February 28, 2025.

The applicable sections of the current Texas Workforce Commission's Financial Monitoring Guide, applicable provisions from the OMB Circular, federal and State regulations in concert with proprietary instruments and guides developed by **Christine H. Nguyen, CPA** were used in performing this financial evaluation.

The desk review was conducted by Christine Nguyen, CPA, Michael Nguyen, CPA, Mary Yee, Brittney Nguyen, Mai Horio, Jack Nguyen (the firm). Exit conference was conducted on June 12, 2025. Additional documents were provided on June 23-24, and August 6, 2025.

OVERVIEW

The financial review was conducted for the period of June 1, 2024 through February 28, 2025 on the WIOA Youth Contract.

The scope of this financial evaluation included a review of the following:

- Audit
- Cash Management
- Cost Allocation
- Disbursements
- Financial and Other Reporting
- Insurance

The following areas were reviewed with instances of non-compliance or otherwise reportable conditions:

- Expenditure Disbursements

The issues as identified in the Schedule of Financial Findings and Recommendations will be classified as either an observation or a finding.

- **Observation:** The financial areas as identified are not considered as non-compliance issues with federal and State rules and regulations or contract requirements. The intent for the recommendations of these observations is to strengthen the subcontractor's current accounting systems.
- **Finding:** The financial areas as identified are considered as non-compliance issues with federal and State rules and regulations or contract requirements. The subcontractor must implement a corrective action plan immediately to address these findings.

SCHEDULE OF FINANCIAL FINDINGS AND RECOMMENDATIONS

I. AUDIT

We have reviewed the SER Metro Detroit, Jobs for Progress, Inc Single Audit June 30, 2024. *The auditors have issued an unqualified opinion. No questioned costs were identified.*

II. CASH MANAGEMENT

SERCO utilized Comerica (Operating Account) to process WSA activities. The cash management system was evaluated to ensure that the following processes have been implemented:

1. To minimize the time lapse between the receipt of funds from WSA and disbursement of those funds.
2. To reconcile bank reconciliations timely.
3. To ensure that the fidelity bond coverage is sufficient to protect WSA from loss.
4. To have written policies and procedures to document cash management processes.

December 2024, January 2025, and February 2025 were reviewed. *No issues were identified.*

III. COST ALLOCATION

SERCO has developed a cost allocation plan (CAP) that addresses the requirements of the TWC FMGC, Chapter 11. January 2025 and February 2025 cost allocation workpapers were reviewed. *No exceptions were identified.*

IV. EXPENDITURE DISBURSEMENTS

The disbursement test was conducted to determine if personnel and non-personnel costs were expended in compliance with federal and State regulations and that expenditures were supported with sufficient documentation.

A. PERSONNEL COSTS

1. Timesheets

We have tested sixteen (16) employees' timesheets. *No exceptions were found.*

B. STAFF INCENTIVES

Seven payments were reviewed. *No exceptions were found.*

C. NON-PERSONNEL COSTS

We selected twenty (20) transactions.

FINDINGS

1. The support documentation has not demonstrated that SERCO's procurement solicitation complied with the TWC FMGC, Chapter 14, Procurement for IT services. SERCO utilized the small purchase method.
2. Two travel costs resulted in disallowed costs.
3. Telephone charges for international calls were charged to WSA.

Details are listed on **Attachment 1-Questioned Costs-\$225.74 plus allocable share of IT expenses.**

RECOMMENDATIONS

1. Provide an agency-wide check register for all payments for the last two fiscal years for IT services so that we may assess that the correct procurement method was used.
2. Calculate the allocable share of IT expenses that were charged to WSA and refund the amount to WSA (W/P 200-16).
3. Calculate wages and fringe benefits for W/P 200-15 and refund to WSA.
4. In addition, refund \$225.74 to WSA.

E. Education and Training

We tested five (5) payments.

OBSERVATION

1. Three transactions did not have monthly contact with the customers.

RECOMMENDATION

1. Train staff to conduct monthly contacts with the customers in training.

F. WORK EXPERIENCE

We tested eighteen (18) payments.

OBSERVATION

1. Information on internal forms was not consistent with actual payrates, date of employment, and funding streams for seven (7) transactions.

RECOMMENDATION

1. Place controls to ensure that data on forms are consistent with actual data.

G. SUPPORT SERVICES – TRANSPORTATION

We tested fifteen (15) payments

FINDINGS

1. No evidence of ISS forms.
2. No evidence of Budget/Financial Assessment forms.

RECOMMENDATION

1. Provide for items listed on **Attachment 2.**

H. CUSTOMER INCENTIVES

We tested twenty-seven (27) payments. *No exceptions were found.*

V. FINANCIAL AND OTHER REPORTING

The following reports were reviewed:

1. Youth Contract FY24 Closeout.

2. Youth Contract - Project-to-Date from October 1, 2024 through February 28, 2025.
3. Employment Tax Reporting.
4. Income Tax Report

OBSERVATION

For the FY25 project-to-date through February 2025 invoices: the budget amounts were not consistent with approved budgets.

RECOMMENDATION

Ensure that budgeted amounts on invoices are consistent with approved budget amounts.

VI. INSURANCE

SERCO is required to obtain and maintain throughout the term of the contract, fidelity bonding, general liability insurance, automobile, errors and omissions insurance, and worker compensation coverage. *No exceptions were found.*

VII. SUMMARY OF QUESTIONED COSTS

Report Section	Attachment	Questioned Costs	Comments
III. Expenditure Disbursements-Non-personnel	1	\$ 225.74	Additional questioned costs are to be added for wages and fringe benefits.
Total		\$ 225.74	



October 15, 2025

Mr. Chakib Chehadi, CEO
C2 Global Professional Services, LLC
P.O Box 92377
Austin, TX 78709

Dear Mr. Chehadi,

Federal and State legislation and policies require recipients of federal and state funds to conduct a financial evaluation of the application of such funds on at least an annual basis. To that purpose, Workforce Solutions Alamo (WSA), with the assistance of Ms. Christine Nguyen, CPA, has completed a *Financial Compliance Monitoring Report*, dated October 7, 2025, of C2 Global Professional Services, LLC (C2 GPS) in its capacity to deliver Adult Workforce Services for Workforce Solutions Alamo (WSA) from March 1 2024, through February 28, 2025.

The report and related attachments provide the results of the financial evaluation and identify the following areas that require resolution:

1. **Expenditure Disbursements**

A. **PERSONNEL COSTS**

Findings:

1. Expense should have been charged to C2 Corporate. Amount to reimburse WSA is \$280.82 (Incentive-\$250, Social Security & Medicare-\$19.13, W/C-\$0.27, 401(K)-\$11.42) plus \$28.08 Indirect Costs, total \$308.90. *C2 concurs.*

Resolution: Refund WSA \$308.90.

2. **Financial & Other Reporting**

Findings:

C2GPS did not submit evidence that the unpaid liabilities were liquidated for funding source WIOA ADULT (23WA2) of \$3,263.07 (Admin-\$158.40, Program-\$3,104.67). *Resolved*

Resolution: C2 provided the correct documentation reflecting all liabilities were liquidated.

3. **Total Disallowed Costs**

The Disallowed Costs are calculated as follows:

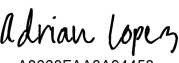
Report Section	Attachment #	Questioned Costs Amount	Indirect Costs - 10%	Total Questioned Costs
III. Expenditure Disbursements, A. Staff Incentives	1	\$ 280.82	\$ 28.08	\$ 308.90
Total		\$ 208.82	\$ 28.08	\$ 308.90

Please coordinate a refund of the total amount of **\$308.90** to WSA. At receipt of payment, this letter confirms Financial Compliance Monitoring Report of C2 GPS the period from May 1, 2024, through February 28, 2025, as closed.

Again, we appreciate the cooperation and assistance your staff provided throughout the review and their outstanding efforts in successfully offering services to the urban and rural communities.

Please contact Gabriela Navarro Garcia, Controller, if you have questions or need further assistance.

Sincerely,

DocuSigned by:

A8660FAA8A94453...

Adrian Lopez
Chief Executive Officer

cc:
Esmeralda Apolinar Ramirez, WSA Sr. Accounting Manager;
Gabriela Navarro Garcia, WSA Controller;
Belinda Gomez, C2 GPS Deputy Director of Fiscal Operations;
Brenda C. Garcia, C2 GPS Managing Director,
Angelina Garcia, C2 GPS Controller;
Amouye Kassi, C2 GPS CFO;
Aaron Smith, C2 GPS COO

**WORKFORCE SOLUTIONS ALAMO
C2 GLOBAL PROFESSIONAL SERVICES, LLC
FINANCIAL COMPLIANCE MONITORING REPORT
May 1, 2024 through February 28, 2025
REPORT #: 24-25-WSA-C2GPS- 07
REPORT DATE: OCTOBER 7, 2025**

CHRISTINE H. NGUYEN
CERTIFIED PUBLIC ACCOUNTANT
4771 Sweetwater Blvd., 195
Sugar Land, TX 77479
(832) 215-9696

INTRODUCTION

Federal and State legislation and policies require recipients of federal funds to conduct a financial evaluation of the application of these funds on at least an annual basis.

Properly conducted financial evaluations measure:

- The degree of compliance with applicable laws, regulations, policies, and procedures.
- Adequacy of management controls.
- Reliable information is captured, reported, and used to improve decision-making.
- Resources are efficiently and effectively used and protected from waste, fraud, and abuse.
- Past, current, and projected effectiveness and efficiency of program administration.
- Financial and program performance relevant to organizational goals.

This report provides the results of the financial evaluation for:

1. C2 Global Professional Services, LLC (C2GPS) in its capacity to deliver workforce services for Workforce Solutions Alamo (WSA) in the Urban areas for the period from May 1, 2024 through February 28, 2025.

The applicable sections of the current Texas Workforce Commission's Financial Monitoring Guide, applicable provisions from the OMB Circular, federal and State regulations in concert with proprietary instruments and guides developed by **Christine H. Nguyen, CPA** were used in performing this financial evaluation.

The desk review was conducted by Christine Nguyen, CPA, Michael Nguyen, CPA, Donna Garrett, Mary Yee, Brittney Nguyen, Mai Horio, and Jack Nguyen (the firm) beginning March 27, 2025. The exit conference was conducted on June 6, 2025. Additional documents were provided through September 3, 2025.

OVERVIEW

The financial review was conducted for the period of May 1, 2024 through February 28, 2025 on all workforce contracts.

The scope of this financial evaluation included a review of the following:

- Audit
- Cash Management
- Cost Allocation
- Disbursements
- Financial Reporting
- Insurance

The following areas were reviewed with instances of non-compliance or otherwise reportable conditions:

- Disbursement

The issues as identified in the Schedule of Financial Findings and Recommendations will be classified as either an observation or a finding.

- **Observation:** The financial areas as identified are not considered as non-compliance issues with federal and State rules and regulations or contract requirements. The intent for the recommendations of these observations is to strengthen the subcontractor's current accounting systems.
- **Finding:** The financial areas as identified are considered as non-compliance issues with federal and State rules and regulations or contract requirements. The subcontractor must implement a corrective action plan immediately to address these findings.

SCHEDULE OF FINANCIAL FINDINGS AND RECOMMENDATIONS

I. AUDIT

The Annual Financial and Compliance Report in Accordance with the CFR Part 200 Uniform administrative Requirements audit report for the period ended September 30, 2023 was reviewed. *No issues were identified.*

II. CASH MANAGEMENT

C2GPS's cash management system was evaluated to ensure that the following processes have been implemented:

- To reconcile bank reconciliations timely.
- To ensure that the fidelity bond coverage is sufficient to protect C2GPS from loss.
- To ensure that funds in excess of FDIC coverage are collateralized.
- To have written policies and procedures to document cash management processes.

We have selected the September 2024, January 2025, and February 2025 bank reconciliations. *No issues were identified.*

III. COST ALLOCATION

We selected the following cost allocation workpapers for testing: September 2024 and February 2025. In addition, C2 utilized a 10% De Minimis Rate for the contract. *No exceptions were found.*

IV. EXPENDITURE DISBURSEMENTS

The disbursement test was conducted to determine if personnel and non-personnel costs were expended in compliance with federal and State regulations and that expenditures were supported with sufficient documentation.

A. Personnel Costs

1. Timesheets – forty-six (46) employees' timesheets were sampled. *No exceptions were found.*
2. Staff Incentives – One (1) payment was selected for review.

Finding

1. Expense should have been charged to C2 Corporate. Amount to reimburse WSA is \$280.82 (Incentive-\$250, Social Security & Medicare-\$19.13, W/C-\$27, 401(K)-\$11.42) plus \$28.08 Indirect Costs, total \$308.90. **Disallowed Costs.**

Recommendation

1. Refund WSA \$308.90.

B. Non-Personnel Costs

Fifteen (15) transactions were sampled. *No exceptions were identified.*

C. Education and Training Payments

Twenty (20) ITAs were reviewed. *No exceptions were identified.*

D. SUPPORT SERVICES-TRANSPORTATION

Forty (40) support services were selected. *No exceptions were identified.*

E. SUPPORT SERVICES-OTHER

1. Twenty-one (21) support services were selected. *No exceptions were identified.*

F. CUSTOMERS INCENTIVES-OTHER

Twenty (20) customer incentives were selected.

OBSERVATION

The Pre-paid Disbursement Form indicates 60 days retention instead of 90 days. *C2 has concurred. Further response is not required.*

G. WORK EXPERIENCE

Twenty-five (25) timesheets were selected.

OBSERVATION

One timesheet did not have employee signature and supervisor's approval.

RECOMMENDATION

Ensure that employee and supervisor's signatures are on timesheets.

V. FINANCIAL & OTHER REPORTING

The following billing reports were reviewed:

- ✓ February 2025 Project-to-Date
- ✓ FY24 Closeout Reports
- ✓ Employment Tax Reports
- ✓ Corporate Tax Reporting

FINDING

1. C2GPS has not submitted evidence that the unpaid liabilities were liquidated for funding source WIOA ADULT (23WA2) of \$3,263.07 (Admin-\$158.40, Program-\$3,104.67).

RECOMMENDATION

1. Provide the evidence of payment for unpaid liabilities or refund WSA \$3,263.07.

VI. INSURANCE

C2GPS is required to obtain and maintain throughout the term of the contract fidelity bonding, general liability insurance, automobile, errors and omissions insurance, and worker compensation coverage. *C2GPS is in compliance with the requirements.*

VII. TOTAL DISALLOWED COSTS

The Disallowed Costs are calculated as follows:

Report Section	Questioned Costs Amount	Indirect Costs - 10%	Total Questioned Costs
III. Expenditure Disbursements, A. Staff Incentives	\$280.82	\$28.08	\$308.90
V. Financial & Other Reporting	\$3,263.07	\$ -	\$ 3,263.07
Total	\$3,543.89	\$28.08	\$3,571.97



MEMORANDUM

To: Executive Committee

From: Adrial Lopez, Chief Executive Officer

Presented By: Gabriela Navarro Garcia, Controller

Date: November 20, 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 (attachment).

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.

workforcesolutionsalamo.org
communications@wsalamo.org

100 N. Santa Rosa Street
San Antonio, Texas 78207
(210) 272-3260

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TX3C Child Care Case Management Board Updates: October 23, 2025

Board Action Items

NEW:

- ☐ **Outreach CCS providers about new Child Care Worker priority for CCS** (10/7/2025 email from Allison Wilson to EDs and from Nina Rodriguez to Board CC contacts)
- ☐ **Complete review of DFPS cases** (9/9/2025 email from Allison Wilson to EDs and from Layla Wiewel to Board CC contacts)
- ☐ **Complete updates to Allocations** (10/21/2025 email from Nina Rodriguez to Board CC contacts)

WEEKLY:

- ☐ **Review new pending/unauthorized Notices of Action** and authorize any that were missed by staff (see weekly emails from Laura Mayorga to Board CC contacts).
- ☐ **Review your Board's CIN file** and reconcile any duplicate CIN numbers (see weekly emails from Laura Mayorga to Board CC contacts).

EVERY PAYMENT CYCLE:

- ☐ **Reminder: Continue to compare the 245 Report to the Payment Matrix** and correct the 245 file as needed each payment run. *If you have not been comparing the 245 Report to the Payment Matrix, you will need to go back and do the comparison on all previously processed payment runs.*

Releases Deployed

KinderTrack Release 4.33 and 4.33.1 – deployed 10/20/2025

Issue Type	Issue key	Summary	Priority
Enhancement	KTTX-1310	Update recertification notice email language	Critical
Bug Fix	KTTX-1348	Issued Date and Date of Distribution - map and label correctly on Recert Notice	High
Bug Fix	KTTX-1414	Expiration Date difference between KT and Parent Central preventing standard application submittal	High
Bug Fix	KTTX-1165	JAWS/accessibility - modal dialogs from select links in KT don't have keyboard shortcuts to close	High
Bug Fix	KTTX-1163	JAWS/accessibility - date picker dialogs missing keyboard shortcut to close in KT	High
Bug Fix	KTTX-1162	JAWS/accessibility - difficult to close date picker dialogue in KT	High
Bug Fix	KTTX-1157	JAWS/accessibility - KT pages missing headings	High

Upcoming Release Plan

Below are the current plans for KinderTrack releases 4.34, 4.35, and 4.36. Note that items in italics were moved out of an earlier release due to failed UAT or changed priorities. This sprint has also been extended a week to allow for the large number of items in scope.

KinderTrack Release 4.34 (UAT on 10/22/25; Prod ≈ 10/31/25 pending successful UAT)

Issue Type	Issue key	Summary	Priority
Bug Fix	KTTX-1392	"Regular Hours" Disappearing from Child's Schedule After Being Discontinued	Critical
Bug Fix	KTTX-1378	Middle Adjustment Not Flagged as "XX" in Performance Report in Case Payment has More than 2 Adjustments	Critical
Bug Fix	KTTX-1354	Nonexistent Family Fee Deducted by Auto-Adjustment	Critical
Bug Fix	KTTX-1315	245 Report Does Not Match KT Payment Amount for Fund_Paid_Amt Field	Critical
Enhancement	KTTX-1338	Create Proof of Absence Notification Document on Family Summary page for 15/30/40 messages	Critical

Issue Type	Issue key	Summary	Priority
Bug Fix	KTTX-1116	Fees being reverted when authorizing a pending notice	Critical
Enhancement	KTTX-1519	245 Report Fixes (from JIRA KTTX-1329)	Critical
Enhancement	KTTX-1518	Performance Report fixes (from JIRA KTTX-1329)	Critical
Enhancement	KTTX-1201	Discontinue Date to be displayed on the Referral Page	High
Enhancement	KTTX-1110	Referrer information to be displayed on the Referral Page	High
Enhancement	KTTX-1022	Update Program Transfer to include Allocation Transfer	High
Bug Fix	KTTX-1378	New Performance Report: Middle adjustment not flagged as "XX" in cases where payment has more than 2 adjustments	High
Bug Fix	KTTX-1388	New Performance Report: incorrect number of units displayed in case QR changed	High
Bug Fix	KTTX-1389	New Performance Report: amounts are missing for some lines	High
Bug Fix	KTTX-1390	New Performance Report: Incorrect number of units displayed for some payments (attendance type changed)	High
<i>Bug Fix</i>	<i>KTTX-1160</i>	<i>JAWS/accessibility - collapsible item not reporting the item is expanded/collapsed in KT</i>	<i>High</i>
<i>Bug Fix</i>	<i>KTTX-1158</i>	<i>JAWS/accessibility - KT collapsible items create multiple elements for screen reader</i>	<i>High</i>
<i>Bug Fix</i>	<i>KTTX-1156</i>	<i>JAWS/accessibility - KT pages missing ARIA landmarks</i>	<i>High</i>
<i>Bug Fix</i>	<i>KTTX-1164</i>	<i>JAWS - KT Does Not Warn User Before Signing Them Out</i>	<i>High</i>
<i>Bug</i>	<i>KTTX-1161</i>	<i>JAWS - Calendar Days Are Not Associated to Weekday Labels in KT</i>	<i>High</i>

KinderTrack Release 4.35 (UAT on 11/5/25; Prod ≈ 11/13/25 pending successful UAT)

Issue Type	Issue key	Summary	Priority
Report	KTTX-1535	Add Babel TX and EO Language (English Only) to Family and Provider Notices/Authorizations	High
Bug	KTTX-1484	Payment statement not reflecting rate change	High
Enhancement	KTTX-1419	Lock Down Editing Schedules Once Authorized	High
Report	KTTX-1410	Create Report - Provider Messages	Critical
Bug	KTTX-1404	Absence Alert Emails Sent to Multiple Families/Sponsors for Children who Transferred Boards	Critical
Enhancement	KTTX-1359	Create Child and Parent CIN on Referrals When Blank	High
Bug	KTTX-1159	JAWS - Expanding/Collapsing Left Menu Moves Screen Reader Focus to Top of Page in KT	High

KinderTrack Release 4.36 (UAT on 12/1/25; Prod ≈ 12/10/25 pending successful UAT)

Note this release will include the new fields and functionality to support the new Child Care Worker Priority (as required by SB 642, 89th Texas Legislature).

Issue Type	Issue key	Summary	Priority
Bug Fix	KTTX-1200	Cannot create Discontinue Notice after creating adjusted payments	High
Enhancement	KTTX-1468	Add Babel and Equal Opportunity Language to TX Absence and Application Messages	High
Bug Fix	KTTX-1449	Sponsor not found under assigned provider in KinderConnect	High
Enhancement	KTTX-1331	Add New Priority Group - Childcare Worker Parent - FM BridgeCare to Intake	Critical
Enhancement	KTTX-1551	One-time update of existing waiting list applications with child care worker priority data	Critical
Enhancement	KTTX-1208	Add Parent Contact info to Intake Search Results Grid and CSV	High
Bug Fix	KTTX-1058	Error when shortening Schedule	High
Enhancement	KTTX-1034	TRS Rating on Payment Statement Report – dbo.spReportStatementDetails	High
Bug Fix	KTTX-1015	Schedule Save Needs to check future agreements – User get the WPI that the provider does not have an agreement when saving a schedule.	High
Enhancement	KTTX-1079	Update Family Notes sizing	Medium

Issue Backlog

The Program Assistance team reviewed the issues submitted last month by WIN-Texas to capture the status of these issues. Please note that this list is not the complete backlog; CC&EL is refining the full backlog.



WIN%20TX%20-%20
TX3C%20Concerns%20