



OVERSIGHT COMMITTEE MEETING

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

February 9, 2024

9:00 AM

AGENDA

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

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

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

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- I. CALL TO ORDER
Presenter: Dr. Sammi Morrill, Committee Chair
- II. ROLL CALL AND QUORUM DETERMINATION
Presenter: Dr. Sammi Morrill, Committee Chair
- III. DECLARATIONS OF CONFLICT OF INTEREST
Presenter: Dr. Sammi Morrill, Committee Chair
- IV. PUBLIC COMMENT
Presenter: Dr. Sammi Morrill, Committee Chair
- V. CONSENT AGENDA (DISCUSSION AND POSSIBLE ACTION)
Presenter: Dr. Sammi Morrill, Committee Chair
 - a. Meeting Minutes – November 13, 2023
- VI. BRIEFING: QUALITY ASSURANCE (DISCUSSION AND POSSIBLE ACTION)
Presenter: Dr. Ricardo Ramirez, Director of Quality Assurance
 - a. Quality Assurance Update
 - b. Monitoring Outcomes and Technical Assistance
 - c. Update on Improvements from TWC Annual Monitoring
 - d. TWC Equal Opportunity Monitoring (Final Report/Letter)
 - e. TWC Performance – Number of Employers Receiving Workforce Assistance
- VII. PROCUREMENT BRIEFING (DISCUSSION AND POSSIBLE ACTION)
Presenter: Jeremy Taub, Director of Procurement and Contracts
 - a. Contract Summary and RFP Updates
 - b. Update on Implementation of Recommendations from the Procurement Consultant
- VIII. BRIEFING: PROGRAMS & OPERATIONAL (DISCUSSION AND POSSIBLE ACTION)
Presenter: Teresa Chavez, COO
 - a. Performance, Programs, and Operational Updates
 - b. UI Weekly Work Search Contact Requirement
 - c. Workforce Center Certifications
- IX. IT IMPLEMENTATION (DISCUSSION AND POSSIBLE ACTION)
Presenter: Chuck Agwuegbo, Director of Innovation and Technology
- X. CEO REPORT
Presenter: Adrian Lopez, CEO
 - a. Ready to Work
- XI. CHAIR REPORT
Presenter: Dr. Sammi Morrill, Committee Chair

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XII. EXECUTIVE SESSION:

Pursuant to Chapter 551 of the Texas Open Meetings Act, the Committee may move into Executive Session for discussion on any issue for which there is an exception to the Act as set out in section 551.071 et. seq. including, but not limited to, the following:

- a. Government Code §551.072 – Discussions Regarding Purchase, Exchange, Lease, or Value of Real Property if Deliberation in an Open Meeting Would Have a Detrimental Effect on the Position of Workforce Solutions Alamo in Negotiations with a Third Party;
- b. Government Code §551.071 – All Matters Where Workforce Solutions Alamo Seeks the Advice of its Attorney as Privileged Communications Under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas;
- c. Pending or Contemplated Litigation;
- d. Government Code §551.074 – Personnel Matters Involving Senior Executive Staff and Employees of Workforce Solutions Alamo; and
- e. Government Code §551.089 – Discussions Regarding Security Devices or Audits.

XIII. ADJOURNMENT

Presenter: Dr. Sammi Morrill, Committee Chair



OVERSIGHT COMMITTEE MEETING - MINUTES

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

November 13, 2023

9:00 AM

BOARD OF DIRECTORS: Dr. Sammi Morrill (Chair), Leslie Cantu, Becky Butler Cap, Esmeralda Perez, Allison Greer Francis

STAFF: Adrian Lopez, Adrian Perez, Gabriela Navarro Garcia, Penny Benavidez, Jessica Villarreal, Jeremy Taub, Rebecca Espino Balencia, Kristen Rodriguez, Vanessa McHaney, Gabriela Horbach, Roberto Corral, Brenda Garcia, Daisey Vega, Sylvia Perez, Angela Bush, Victoria Rodriguez, Gabriela Ore, Ramsey Olivarez, Belinda Gomez, Chakib Chehadi, Dr. Ricardo Ramirez, Jesse Maldonado, Manuel Ugues, Trema Cote

PARTNER STAFF: None.

LEGAL COUNSEL: None.

GUESTS: None.

AGENDA

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I. CALL TO ORDER

Presenter: Dr. Sammi Morrill, Committee Chair

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

II. ROLL CALL AND QUORUM DETERMINATION

Presenter: Dr. Sammi Morrill, Committee Chair

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

III. DECLARATIONS OF CONFLICT OF INTEREST

Presenter: Dr. Sammi Morrill, Committee Chair

None.

IV. PUBLIC COMMENT

Presenter: Dr. Sammi Morrill, Committee Chair

None.

V. CONSENT AGENDA (DISCUSSION AND POSSIBLE ACTION)

Presenter: Dr. Sammi Morrill, Committee Chair

a. Meeting Minutes – October 6, 2023

Upon motion by Leslie Cantu and seconded by Allison Greer Francis, the Committee unanimously approved the Consent Agenda item a. Meeting Minutes – October 6, 2023.

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

Presenter: Dr. Ricardo Ramirez, Director of Quality Assurance

a. TWC Annual Monitoring

- TWC conducted its annual monitoring and completed the onsite testing from October 10th through the 24th. The Exit Conference Report included the following items (these items may change when TWC issues the Final Report):
 1. Fiscal Disbursements (repeat finding related to procurement and potential questioned costs) for Syndicate Wave – Procurement Consultant and Martin

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- & Drought – Legal.
- 2. Leases (repeat finding) for Marbach Workforce Center, San Antonio Food Bank, and Port Authority of San Antonio.
- 3. Procurements for professional development training services for childcare providers and mechanical services (handyman).
- 4. Personal Identifiable Information (PII) – TWC had a walkthrough at the Marbach Workforce Center which showed lack of barriers to cover/secure PII at the reception desk and unsecured emails and passwords found in staff cubicle.
- Next step is the Initial Resolution Notification with 45 days for WSA to resolve issues.
 - i. Draft Plan for Responses
 - TWC indicated that the board improperly amended two contracts by adding services to the existing scope and increasing costs not provided for by the original proposal solicitation and contract documents. Amending contracts beyond the original scope, length, and amount is not permitted unless provided for in the original contract.
 - Legal Services Contract amended to increase the budget. The contract exceeded the budget of \$90,000 annually.
 - Procurement Consultant Contract extended and increased the scope of the contract and increased the budget. The contract exceeded the budget of \$20,700 over a four-month period.
 - The lease at the San Antonio Food Bank had improperly dated the needs determination and market assessment. They were dated after the lease execution.
 - The lease at the Port Authority of San Antonio had improperly dated the needs determination and market assessment. They were dated after the lease execution.
 - As an outcome of the recommendations and technical assistance provided from TWC, the board shall take the following steps to continue to strengthen controls around procurement processes.
 - Develop expenditure tracking processes and reporting monitor budget spend rates to prevent exceeding unauthorized contract expenditures.
 - Revise Standard Operating Procedures to outline the conditions for amending contracts, including proper procedures adding additional services that were not originally procured. Procurement staff will expand coordination with the fiscal department, programs and operations, and quality assurance as appropriate to obtain necessary information to complete each amendment and include topic in monthly board staff training.
 - The board staff will conduct a subsequent internal review of all property leases. This process will further analyze the existing leasing to ensure they align with TWC's Financial Manual for Grants Contracts and WSA's Lease Procurement procedures.
 - Chair Dr. Sammi Morrill asked if the level of risk will include disallowed

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costs. CEO Adrian Lopez stated that there are potential disallowed costs, however, WSA made the decision to pay for some of these costs using non-federal funds.

b. Quality Assurance Update

- TWC started its Equal Opportunity monitoring led by Caroline Goddard, WSA's Equal Opportunity Officer. A draft or final report has not been received.
- TWC completed the Child Care and Development Fund engagement and submitted a final report with no errors or concerns with improper payments.
- Office of Child Care Texas Monitoring Review will monitor child care. This will be reported to the Early Care & Education Committee.
- Health & Human Services Commission has started monitoring SNAP E&T fiscal transactions. The fiscal department will report this to the Audit & Finance Committee.
- External monitoring has completed review of WIOA Youth with SERCO and has a 95.52% accuracy rate. Items highlighted for continuous improvement include support services, incentives, and performance outcomes.
- WSA is renewing the CPA's, Ms. Nguyen, monitoring contract for one additional year, which is the first of a four-year renewal option.
- Internal monitoring has completed review of RESEA with C2GPS and has a 93.3% accuracy rate. Items highlighted for continuous improvement include individual employment plan employment goal and review date.
- Digitizing paper records are 100% complete, which included digitizing participant hard copy paper records.

c. Monitoring Outcomes and Technical Assistance

- Added WIOA Youth and RESEA.
- Most recent program monitoring reviews having attributes with accuracy rates less than 90% include TAA, WIOA Youth, WIOA Dislocated Worker/Adult, TANF/Choices, SNAP E&T, and NCP. The SNAP E&T and NCP TWC Audit Resolutions attributes have been resolved, but QA will continue supporting programs and operations to ensure WSA retains compliance.
- TWC placed WSA on an informal performance improvement action plan for WIOA Dislocated Worker Measurable Skills Gains and Credential Rate.

d. TWC Performance – Claimant Reemployment Within 10 Weeks

- TWC contracts board for two Reemployment & Employer Engagement Measures (REEMS), one of which includes the Claimant Reemployment within 10 Weeks.
- Based on work search reemployment requirements, the percentage of claimants eligible to receive UI benefits who gain employment within 10 weeks. The performance period runs from July 1 to June 30.
- Dislocation from work decreases household income, which increases poverty and income inequality. Further, unemployed workers represent untapped labor market potential, negatively impacting regional economic activity. The Claimant Reemployment measure aims to help affected workers quickly gain employment.
- The denominator is the number of monetarily eligible initial claimants subject to

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work search requirements and active in WIT during the ten weeks before or after the initial determination of monetary eligibility.

- The numerator is the unduplicated number of persons from the denominator reemployed within ten weeks of the date their claim is first determined monetarily eligible or the date of the first WIT service after determining them as monetarily eligible.
- TWC reports the year-end performance in the September Monthly Performance Report (MPR).
- Except for the current year, WSA has consistently met or exceeded the Claimant Reemployment measures. The state has acknowledged some issues this year with the reporting of this measure.

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

Presenter: Teresa Chavez, COO

Presented by: Rebecca Espino Balencia, Interim Director of Workforce Services

a. Performance, Programs, and Operational Updates

- Childcare's performance unofficial YTD average for FY23 is 106.29%.
- Alamo has 30% of its CCS centers that are TRS certified.
- The Student HireAbility Navigators Hires Event concluded on October 12th at the Datapoint Career Center. 90 participants attended this event, 5 individuals were offered employment on that day, and 1 full time employment has started. The Alamo Helping Hands Event with Southside First occurred on November 2nd at the S. Flores Career Center. 25 vendors participated in the half day event and represented unique service offerings for those with disabilities. A post-secondary corner featured different universities and partners. 54 individuals availed themselves to community information. A VR Specialist provided hands on demonstration of center equipment and other items available for individuals to assimilate into a successful career position.
- Training and Employment Navigator Pilot: Target enrollment was 12, 9 are actively enrolled in Q6, and 92 participants have been served year to date.
- Military Family Support Program: 1 new enrollment and 2 are in training. WSA continues to strengthen partnerships with JBSA, US Chamber of Commerce Foundation – Hiring Our Heroes, and Spouse Networking Groups. Also, braiding Ready to Work.
- Gears for Careers – Middle Skills Pilot: 87 referrals have been received to date. This grant helps to provide supplies, clothing, and other support services.
- RESEA: Per the last TWC report, WSA is reporting at 93.7%. TWC requires boards to have an 80% completion rate.
- WIOA Youth: For the first month of the program, there have been 20 enrollments, 8 youth enrolled in training, and 6 into work experience. The participant work experience enrollment target is 365.
- Ready to Work: 3,952 applicants interviewed, 2,310 case managed/enrolled in training, 251 completed training, and 118 placed in quality jobs. A hiring event on November 29th is being planned with the City of San Antonio for CDL

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graduates.

VIII. CEO REPORT

Presenter: Adrian Lopez, CEO

a. Ready to Work Monitoring

- There is a potential disallowed cost of \$5,000 for Chrysalis Ministries.

IX. CHAIR REPORT

Presenter: Dr. Sammi Morrill, Committee Chair

None.

X. EXECUTIVE SESSION:

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- c. Pending or Contemplated Litigation;
- d. Government Code §551.074 – Personnel Matters Involving Senior Executive Staff and Employees of Workforce Solutions Alamo; and
- e. Government Code §551.089 – Discussions Regarding Security Devices or Audits.

None.

XI. ADJOURNMENT

Presenter: Dr. Sammi Morrill, Committee Chair

Upon motion by Becky Butler Cap and seconded by Allison Greer Francis, Chair Dr. Sammi Morrill adjourned the meeting at 10:10am.



MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented By: Ricardo Ramirez, Director of Quality Assurance

Date: February 9, 2024

Subject: Quality Assurance Update

Summary: Quality Assurance's briefing of current monitoring activities for the WSA Board of Directors. The items do not require board action.

TWC Monitoring

Annual Monitoring: We have prepared a separate briefing to report follow-up actions to address TWC's Exit Conference Report.

EO Monitoring: Staff is presenting the information as a separate agenda item.

Other Monitoring Activities

Office of Child Care (OCC): WSA childcare staff are working with TWC to complete the Office of Child Care's (OCC) Texas monitoring of the CCDF (a federal-level review). Childcare board staff will report the engagement to the Early Care & Education Committee.

Health & Human Services Commission (HHSC): HHSC's monitoring of SNAP E&T fiscal transactions is ongoing. Fiscal board staff will report the item to the Audit & Finance Committee.

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

- *Child Care – COSA:* 61% complete.

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WSA Internal QA Program Monitoring

- *Summer Earn and Learn (SEAL)* – C2 GPS: 100% complete; 100% accuracy rate.
- *Teacher Externship* – C2 GPS: 100% complete; 100% accuracy rate.
- *SNAP, NCP, Choices, TAA, WIOA Adult/Dislocated Worker* – C2 GPS: Informal Technical Assistance review: 97% complete.

WSA Other Activities

- *Technical Assistance (TA)*: Supporting WSA departments and subrecipients with TA for areas with low accuracy rates, policy development, and other supports.

Fiscal Impact: WSA's External Program Monitoring contract with Ms. Christine Nguyen, CPA: \$225,000.

Recommendation: TWC requires Boards to have qualified Monitoring Staff to carry out the Board's oversight responsibilities. Continue supporting WSA's QA Department to promote the agency's integrity and continuous quality improvement efforts.

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:

Estimated Timeline – *External* Program Monitoring Activities 2023-2024

Estimated Timeline – *Internal* Program Monitoring Activities 2023-2024



Estimated Timeline – External Program Monitoring Activities 2023-2024

Initial Estimated Timeline				Actual Timeline						
<i>External Program Monitoring</i>	<i>Duration **</i>	<i>Start</i>	<i>Finish</i>	<i>Duration **</i>	<i>Effort</i>	<i>Variance</i>	<i>Start</i>	<i>Finish</i>	<i>% complete</i>	<i>Comments</i>
Estimated Timeline: 2023-2024	263	11/6/2023	11/6/2024	233	0	Duration	12/18/2023	11/6/2024	61.0%	
COSA - Child Care Services	32	12/18/2023	1/30/2024				12/18/2023		61%	In progress
COSA - CC QIA	46	1/8/2024	3/11/2024							
CONSORTIUM - Ready to Work	60	2/1/2024	4/24/2024							
C2GPS - WIOA Adult & Dislocated Worker	55	3/25/2024	6/7/2024							
C2GPS - SNAP	45	5/1/2024	7/2/2024							
C2GPS - NCP	49	6/3/2024	8/8/2024							
SERCO - WIOA Youth	40	7/8/2024	8/30/2024							
C2GPS - TANF/Choices	47	9/3/2024	11/6/2024							

Avg Duration or Effort (days) → 47

Multi-tasking (% days overlapping projects) → 29.7%

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

Modification Notes

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



Estimated Timeline – *Internal* Program Monitoring Activities 2023-2024

Initial Estimated Timeline				Actual Timeline						
<i>Internal Program Monitoring</i>	<i>Duration</i> ⁺⁺	<i>Start</i>	<i>Finish</i>	<i>Duration</i> ⁺⁺	<i>Effort</i>	<i>Variance</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>	<i>% complete</i>
Estimated Timeline: 2022-2023	253	11/14/2023	10/31/2024	253	41	Duration	11/14/2023	10/31/2024		100.0%
C2GPS - Teacher Externship	45	11/14/2023	1/15/2024	39	34	-6	11/14/2023	1/5/2024		100%
C2GPS - SEAL	41	12/20/2023	2/14/2024	9	7	-32	12/6/2023	12/18/2023		100%
C2 GPS - PII & Priority of Service	29	1/30/2024	3/8/2024							
C2 GPS - TAA Phase II	42	3/11/2024	5/7/2024							
C2 GPS - RESEA	45	4/15/2024	6/14/2024							
C2 GPS - PII & Priority of Service	29	8/1/2024	9/10/2024							
Other projects as the need arises	66	8/1/2024	10/31/2024							

Avg Duration or Effort (days, excludes "Other") → 39 24 21 -19

Multi-tasking (% days overlapping projects) → 14.8%

-427.1%

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

Modification Notes

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



MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented By: Ricardo Ramirez, Director of Quality Assurance

Date: February 9, 2024

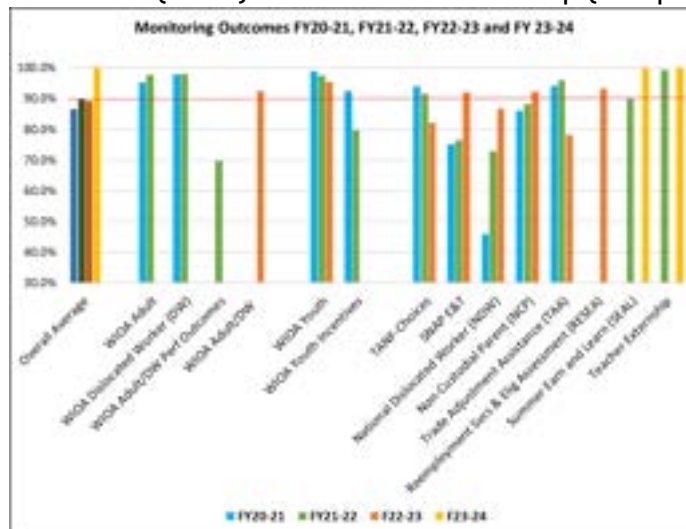
Subject: Monitoring Outcomes and Technical Assistance

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

Monitoring Outcomes

The table below compares monitoring outcomes for Fiscal Years 2020-2021, 2021-2022, 2022-2023, and 2023-2024 (Oct-Sep timeframe). The red line at 90% represents the minimum expected accuracy rate threshold. We updated the figures to include:

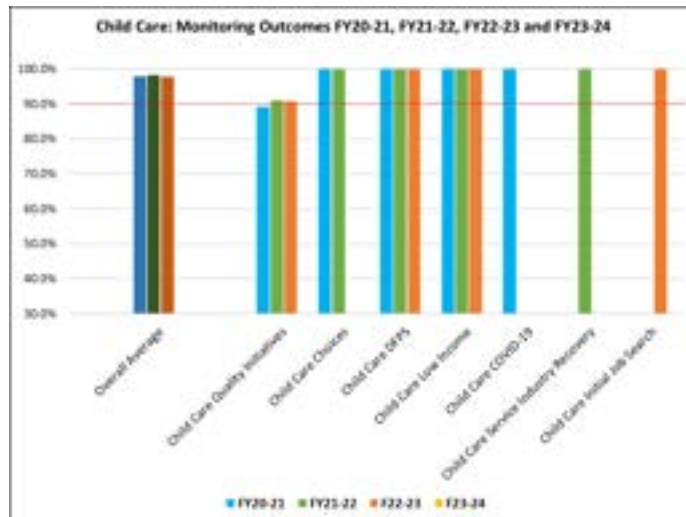
- Summer Earn and Learn (SEAL) and Teacher Externship (no updates in childcare yet).



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Background

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

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

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

Technical Assistance

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

- While an overall accuracy rate for a single engagement may exceed the 90% threshold, one or more of the attributes that we test may fall below the threshold.
- Attributes that fall below the 90% threshold prompt intervention in the form of technical assistance and process improvements.



Update on Contractor Monitoring: TWC requires boards to implement corrective action plans and document improvement for items with low accuracy rates.

To assist with the process, QA developed a 'dashboard' that identifies monitoring trends for each grant for the past 2-3 years, from which board staff have identified several grants with 'repeat' findings.

Board staff are working on process improvements for the following grants:

- SNAP,
- NCP,
- Choices,
- TAA, and
- WIOA Adult/Dislocated Worker.

Based on the information, board staff implement process or continuous improvement efforts with contractors, including:

- The actions described in the 'Background' section (above);
- Board staff review the items during monthly Board-Contractor meetings and offer technical assistance;
- Board staff develop TEAMS portals to centralize and manage progress and improvement efforts;
- Contractor staff intensify their internal monitoring reviews to focus on attributes that we know TWC will test and submit their monitoring results to board staff regularly;
- QA implements an 'informal' regular review/sampling of the attributes in question (the first round is 97% complete);
- Board staff prepares the needed documentation for submission to TWC
 - TWC usually requests the information during the Annual Monitoring to validate the board's oversight capacity.

Fiscal Impact: Not applicable.

Recommendation: QA recommends the continued support of the board as we coordinate continuous improvement efforts with contractors.

Strategic Objective: To help ensure that local employment and training activities, including one-stop delivery systems and workforce development services, appropriately use, manage,



and invest funds as required and in ways that maximize performance outcomes (WIOA Sec. 107(d)(8); WIOA Sec. 134(2)(B)(iv); WIOA Sec. 183; WIOA Sec. 185(c)(3); WIOA Sec. 121(3); WIOA Sec. 129(b)(1)(e); TWC's Board Oversight Capacity evaluation, Texas Labor Code §302.048, TWC Rule §Title 40, Part 20, Chapter 802, Integrity of the Texas Workforce System, particularly §802.61; WD 29-15, Chg. 1; TWC Agency-Board Agreements and Grant Contracts).

Attachments: None.



MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented By: Ricardo Ramirez, Director of Quality Assurance, Teresa Chavez, COO, Jeremy Taub, Director of Procurement and Contracts

Date: February 9, 2024

Subject: Update on Improvements from TWC Annual Monitoring

Summary: Briefing of WSA's follow-up actions to address TWC's Annual Monitoring Exit Conference findings. The briefing includes two sets of actions. The first addresses the PII (personal identifiable information) issues, with the Program/Operations department preparing the report. The second summarizes procurement processes and improvements the board is implementing to increase controls related to contracts and leases. ***Supporting Texas Talent and Economic Growth – Goal 2, Service Optimizers.*** The item does not require board action.

Programs/Operations Report – PII Findings

TWC Annual Monitoring

TWC conducted its Annual Monitoring and completed the onsite testing from October 10th through the 24th. TWC provided an Exit Conference with an accompanying Exit Conference Report on October 24th.

TWC Exit Conference Report

TWC's Exit Conference Report cited WSA for not properly securing Personal Identifiable Information (PII) at the centers. Please note that the report is in an initial or draft format, meaning that the items may or may not be included (or adjusted) in the Final Report.

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Personal Identifiable Information (PII)

The TWC Auditors performed a walkthrough to test the security of PII at the Marbach Workforce Center and cited the following two items:

1. Lack of barriers to cover/secure PII at the reception desk (adequate protection requires a minimum of two barriers).
2. Unsecured emails and written passwords in an empty staff cubicle.

TWC also expressed concern regarding storage area maintenance concerning PII security (although they did not report it as a finding).

TWC Next Steps

TWC Audit Resolution may issue an "Initial Resolution Notification" with administrative findings (we do not expect questioned costs). WSA will have 45 calendar days from the date of issuance of the notification to demonstrate resolution.

WSA Process Improvement Approach

Our process improvement approach to resolve the items and document improvement includes the following elements:

- a) *Planning*: Evaluate, strategize, and set actionable goals;
- b) *Policies & Procedures*: Review and update as needed;
- c) *Training*: Offer technical assistance and training for staff;
- d) *Testing*: Assess compliance by testing and reporting progress.

WSA Action Items

1) Lack of barriers to protect PII at the reception (via the VOS Greeter)

- a. VOS greeter process (at the reception desk)
 - i. Evaluated each center's VOS greeter process.
 - ii. Moved screens facing the public to face reception staff – if the customer needs to enter PII, the staff asks them to complete the process at an adjacent protected location.
 - iii. Challenges:
 1. Some centers are small, and creating a separate setting where customers may enter the PII becomes difficult.
 2. The process now requires additional staffing (but this can/should be positive for customers).



3. Some screens/monitors are fixed (cannot be moved, which may require build-out or alternate resolution, such as screen protectors). The monitors that could not be moved were turned off.
- b. Build-out
 - i. Staff adjusted the triage areas to address PII concerns by adding protective screens on the monitors. Additional consideration is being done on the technology used during the VOS greeter process.
 - c. Screen Protectors
 - i. Staff ordered screen protectors and installed these in 16 of our workforce offices. We anticipate completion by no later than February 2023.
 - ii. These screens form an optical barrier to prevent others from viewing PII information (e.g., while clients enter VOS greeter data).
 - iii. Our screen protectors align with TWC's list of compliant screen protectors.

2) Unsecured PII in the physical environment

- a. Implemented a layered approach for the walkthroughs at the centers:
 - i. Center staff (contractor staff) performs walkthroughs regularly (e.g., monthly):
 - ii. Board staff also perform unannounced walkthroughs regularly (e.g., quarterly).
 - iii. QA board staff will perform the "formal" final testing. TWC has certified QA's monitoring, so we expect TWC to use QA's walkthrough results instead of TWC performing walkthroughs themselves).
- b. Storage Rooms
 - i. Board staff is coordinating with contractors to clean up/organize storage rooms at each location (we also review these areas during the walkthroughs).
 - ii. Board staff is establishing a timeline to facilitate the clean-up.
- c. Public Areas
 - i. Other requirements come into play in public areas, which both the contractor and board staff review during the walkthroughs. These include:
 1. Secured shredding bins placed near copiers with regular emptying.
 2. Resource Room/Reception Areas.



- d. Staff training/technical assistance
 - i. Board Staff will schedule training and/or technical assistance with contractors to address the findings as early as February 2024.
- e. Procedures
 - i. WSA is working with the contractor staff to establish preventative procedures to address all areas of concern.

Procurement and Contracts Report – Procurement/Lease Findings

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

TWC – Monitoring concerns: (pending review and issuance of final report)

1. *Contracts:*

- *Legal Services Contract* - The original contract value is not to exceed \$90,000, however the original contract value for the term excluded a budget for non-routine matters, which caused the contract to be amended. The contract was recently renewed within budgetary limits, subject to any authorized changes. Additionally, the scope of service and budgetary requirements was reviewed by the contractor.
- *Procurement Consultant Services* - In October 2022, the board sought to amend the contract with The Syndicate Wave to enable implementation of their recommendation plan and provide ongoing support services for an increased cost of \$56,212.72. As a result of the monitoring review, the board submitted a journal entry to pay overage amount using non-federal to mitigate risk of any potential dis-allowed cost. The services were completed, and this contract is now expired.

2. *Leases:*

- The monitoring review conducted by TWC notated that required Needs Determination and Market Analysis for two of the board's leases weren't dated properly for the boards' leases at San Antonio Food Bank and the Port San Antonio locations. The Needs Determination and Comparative Market Assessment, CMA is completed for every procurement that we request for properties.



- The assessments were added to our Lease Policy and Procedures following last year's audit review and from the direction provided by TWC Audit Resolution to have more concise and detailed documentation that clearly shows that the board has demonstrated proper compliance.

3. *Procurement Process:*

- *Conflict of Interest* - The procurement process is being reviewed more thoroughly for each purchase transaction for accurate and complete documentation.
- *Independent Estimate* - The procurement process is being reviewed more thoroughly for each purchase transaction for accurate and complete documentation.

Process Improvement:

- Implemented more thorough review of supporting justification for all contract actions has been updated through its memo review process to include a more thorough and comprehensive review of all stakeholders.
- The board's Procurement and Contracts Management staff have reviewed its procurement processes to ensure compliance. Additionally, training for both procurement and board staff has been actively ongoing to address contract spend management, amendment procedures, and accuracy of its procurement files.
- WSA performed a desk-top review lease-by-lease for each property to ensure required documentation is properly dated to align with recent implementation of WSA lease procedures and tools.
- Limiting amendment of contracts beyond the original scope, length, and amount unless provided for in the original contract.

Next Steps: Procurement and Contracts Management will continue proactively monitoring contract compliance, embracing a continuous process improvement culture, and integrating an internal quality assurance process.

Timeline: The procurement process improvements have remained ongoing since October 2022, with adjustments made as necessary, and reviewed annually.

Fiscal Impact: Potential costs for identity protection and PII breaches. Strengthening controls will ensure full compliance and guard against future question costs. Additionally, it's



anticipated these controls will yield cost-savings and more significant contract negotiation positions.

Attachments: None.



MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented By: Ricardo Ramirez, Director of Quality Assurance

Date: February 9, 2024

Subject: TWC Equal Opportunity Monitoring (Final Report/Letter)

Summary: Briefing on TWC's Equal Opportunity (EO) Monitoring outcomes. The item does not require board action.

Background: The Code of Federal Regulations (29 CFR § 38.31(b)) requires the Texas Workforce Commission (TWC) to monitor boards' compliance with equal opportunity laws. The effort aligns with Section 188 of WIOA, which prohibits discrimination on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, or for beneficiaries, applicants, and participants only, on the basis of citizenship status.

TWC's audit includes a review of the board's policies and procedures and a thorough assessment of EO and accessibility requirements at center locations.

TWC EO Monitoring Outcomes: The State of Texas Equal Opportunity Officer issued a letter to WSA dated January 9, 2024, to report TWC's completion of the FY 2024 review of WSA. In the letter, TWC's Equal Opportunity Compliance Department (EOCD) reported no findings and no issues. TWC thanked Ms. Caroline Goddard, WSA's EO Officer, for her assistance during the review.

Fiscal Impact: WSA purchases accessibility equipment and software, but we have not estimated related costs. Staff will estimate costs moving forward.

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Recommendation: TWC requires the assignment of an EO Officer to oversee the board's EO responsibilities. Continue supporting WSA's EO activities to ensure adherence to EO laws.

Strategic Objective: To help ensure WSA fully complies with EO laws, which help (a) ensure that all customers benefit from full access to every program/service and (b) protect the civil rights of customers, employees, and the public.

Attachments: FY24 Workforce Solutions Alamo – EO Final Board Notice.

Texas Workforce Commission

A Member of Texas Workforce Solutions

Bryan Daniel, Chairman
Commissioner Representing
the Public

Alberto Treviño III
Commissioner Representing
Labor

Joe Esparza
Commissioner Representing
Employers

Edward Serna
Executive Director

Report 24.20.0201

January 9, 2024

VIA Email: alopez@wsalamo.org

Mr. Adrian Lopez, Chief Executive Director
Workforce Solutions Alamo
100 N. Santa Rosa St., Suite 120
San Antonio, TX 78207

Dear Mr. Lopez:

The Texas Workforce Commission (TWC) is required to monitor whether our grant subrecipients are complying with the equal opportunity laws (29 CFR § 38.31(b)). Equal Opportunity is a critical subject because (a) these rules assure all customers full access to every program, and also (b) these rules protect the civil rights of customers, employees and the public.

TWC's Equal Opportunity Compliance Department (EOCD) has completed our FY 2024 review for the Workforce Solutions Alamo Board. This letter is our report. The EOCD has no findings and there are no issues which would necessitate a corrective action plan.

Thank you again for your cooperation with this important task. We appreciate the assistance of Ms. Caroline Goddard, your local EO officer. Should you have any further questions concerning the EOCD review, please call the EO Compliance Department Hotline at 512-463-2400.

Sincerely,

Jon Pokorney

Jon Pokorney
State of Texas Equal Opportunity Officer

cc: Leslie Cantu, Board Chair, Workforce Solutions Alamo
Nicholas Lalpui, Regional Administrator, ETA, USDOL
Robert Kenyon, Regional Director, Office of State Systems, ETA, USDOL
Bryan Daniel, Chairman and Commissioner Representing the Public, TWC
Alberto Treviño, III, Commissioner Representing Labor, TWC
Joe Esparza, Commissioner Representing Employers, TWC
Edward Serna, Executive Director, TWC
Courtney Arbour, Director, Workforce Development Division, TWC
Charles E. Ross, Jr., Director, Fraud Deterrence and Compliance Monitoring, TWC



MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented By: Ricardo Ramirez, Director of Quality Assurance

Date: February 9, 2024

Subject: TWC Performance – Number of Employers Receiving Workforce Assistance

Summary: This memorandum presents the role and definitions of TWC-contracted performance measures. TWC contracts boards for two *Reemployment & Employer Engagement Measures (REEMS)*, one of which includes the Number of Employers Receiving Workforce Assistance.

Definition

The measure counts the number of employers 'reporting units' served in the WSA area.

Goal

The performance aims to measure the effectiveness of serving employers through a series of activities that help meet local labor demands. The measure captures a mix of services, such as employer penetration or local reach, focusing on quantity. It also focuses on intensity, such as customized/incumbent worker training or services for specific populations.

Methodology

The measure counts the number of employer locations (based on WorkInTexas/WIT Employer ID and tax accounts – so an employer may have multiple locations) that receive one of the following services in the performance period (October to September). Employer services include:

- Taking job postings;
- Providing specialized testing of job seekers on behalf of an employer;

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- Performing employer site recruitment;
- Job Fairs;
- Providing employer meeting or interview space;
- Providing customized or incumbent worker training;
- Entering into a subsidized/unsubsidized employer agreement;
- Providing Rapid Response;
- Job Development (if recorded with a valid UI Tax ID);
- Work Opportunity Tax Credit (WOTC); and
- Other services provided for a fee.

Sources

TWC uses WIT data to record employer services.

Reporting

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

Current and Historical Outcomes

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



Meeting >= 95%; Exceeding >= 105%. Source TWC's MPR.



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

Recommendation: TWC requires boards to meet or exceed TWC-contracted performance measures as contracted to service providers. The board staff recommends a continued focus on TWC-contracted measures.

Strategic Objective: The Workforce Innovation and Opportunity Act (WIOA) sets out employer engagement and penetration expectations.

Attachments: None.



Quality Assurance

Dr. Ricardo Ramirez, Director of Quality Assurance



Summary

Quality Assurance (QA) Monitoring Activities:

- QA Update
- Monitoring Outcomes & Technical Assistance
- Update on Improvements from TWC Annual Monitoring
- TWC Equal Opportunity Monitoring
- TWC Performance – Number of Employers Receiving Assistance





TWC Monitoring

Annual Monitoring

- We have prepared a separate briefing to report follow-up actions to address TWC's Exit Conference Report.

EO Monitoring

- Staff is presenting the information as a separate agenda item.



Other Monitoring Activities

Office of Child Care (OCC)

- Staff are working with TWC on an OCC Texas Monitoring Review (this is a federal-level review). Childcare board staff will report the item to the Early Care & Education Committee.

Health & Human Services Commission (HHSC)

- HHSC continues to monitor the SNAP E&T fiscal transactions. The fiscal department will report the item to the Audit & Finance Committee.



External / Internal Monitoring

- **Child Care Services Program – COSA:** Currently in progress; 61% complete.
- **Summer Earn and Learn (SEAL) – C2 GPS:** 100% complete, with 100% accuracy rate.
- **Teacher Externship – C2 GPS:** 100% complete, with 100% accuracy rate.
- **SNAP, NCP, Choices, TAA, WIOA Adult and Dislocated Worker – C2 GPS:** Informal Technical Assistance Review, 97% complete.
- **Technical Assistance (TA):** QA offers varied supports to WSA departments and subrecipients, including technical assistance to help improve areas with low accuracy rates, policy development, and other processes.

Monitoring Timeline – External Engagements



Initial Estimated Timeline				Actual Timeline						
<i>External Program Monitoring</i>	<i>Duration⁺⁺</i>	<i>Start</i>	<i>Finish</i>	<i>Duration⁺⁺</i>	<i>Effort</i>	<i>Variance</i>	<i>Start</i>	<i>Finish</i>	<i>% complete</i>	<i>Comments</i>
Estimated Timeline: 2023-2024	263	11/6/2023	11/6/2024	233	0	Duration	12/18/2023	11/6/2024	61.0%	
COSA - Child Care Services	32	12/18/2023	1/30/2024				12/18/2023		61%	In progress
COSA - CC QIA	46	1/8/2024	3/11/2024							
CONSORTIUM - Ready to Work	60	2/1/2024	4/24/2024							
C2GPS - WIOA Adult & Dislocated Worker	55	3/25/2024	6/7/2024							
C2GPS - SNAP	45	5/1/2024	7/2/2024							
C2GPS - NCP	49	6/3/2024	8/8/2024							
SERCO - WIOA Youth	40	7/8/2024	8/30/2024							
C2GPS - TANF/Choices	47	9/3/2024	11/6/2024							

Avg Duration or Effort (days) → 47

Multi-tasking (% days overlapping projects) → 29.7%

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

Modification Notes

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

Monitoring Timeline – Internal Engagements



Initial Estimated Timeline				Actual Timeline						
<i>Internal Program Monitoring</i>	<i>Duration</i> ⁺⁺	<i>Start</i>	<i>Finish</i>	<i>Duration</i> ⁺⁺	<i>Effort</i>	<i>Variance</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>	<i>% complete</i>
Estimated Timeline: 2022-2023	253	11/14/2023	10/31/2024	253	41	Duration	11/14/2023	10/31/2024		100.0%
C2GPS - Teacher Externship	45	11/14/2023	1/15/2024	39	34	-6	11/14/2023	1/5/2024		100%
C2GPS - SEAL	41	12/20/2023	2/14/2024	9	7	-32	12/6/2023	12/18/2023		100%
C2 GPS - PII & Priority of Service	29	1/30/2024	3/8/2024							
C2 GPS - TAA Phase II	42	3/11/2024	5/7/2024							
C2 GPS - RESEA	45	4/15/2024	6/14/2024							
C2 GPS - PII & Priority of Service	29	8/1/2024	9/10/2024							
Other projects as the need arises	66	8/1/2024	10/31/2024							
Avg Duration or Effort (days, excludes "Other") →	39			24	21	-19				
Multi-tasking (% days overlapping projects) →	14.8%			-427.1%						

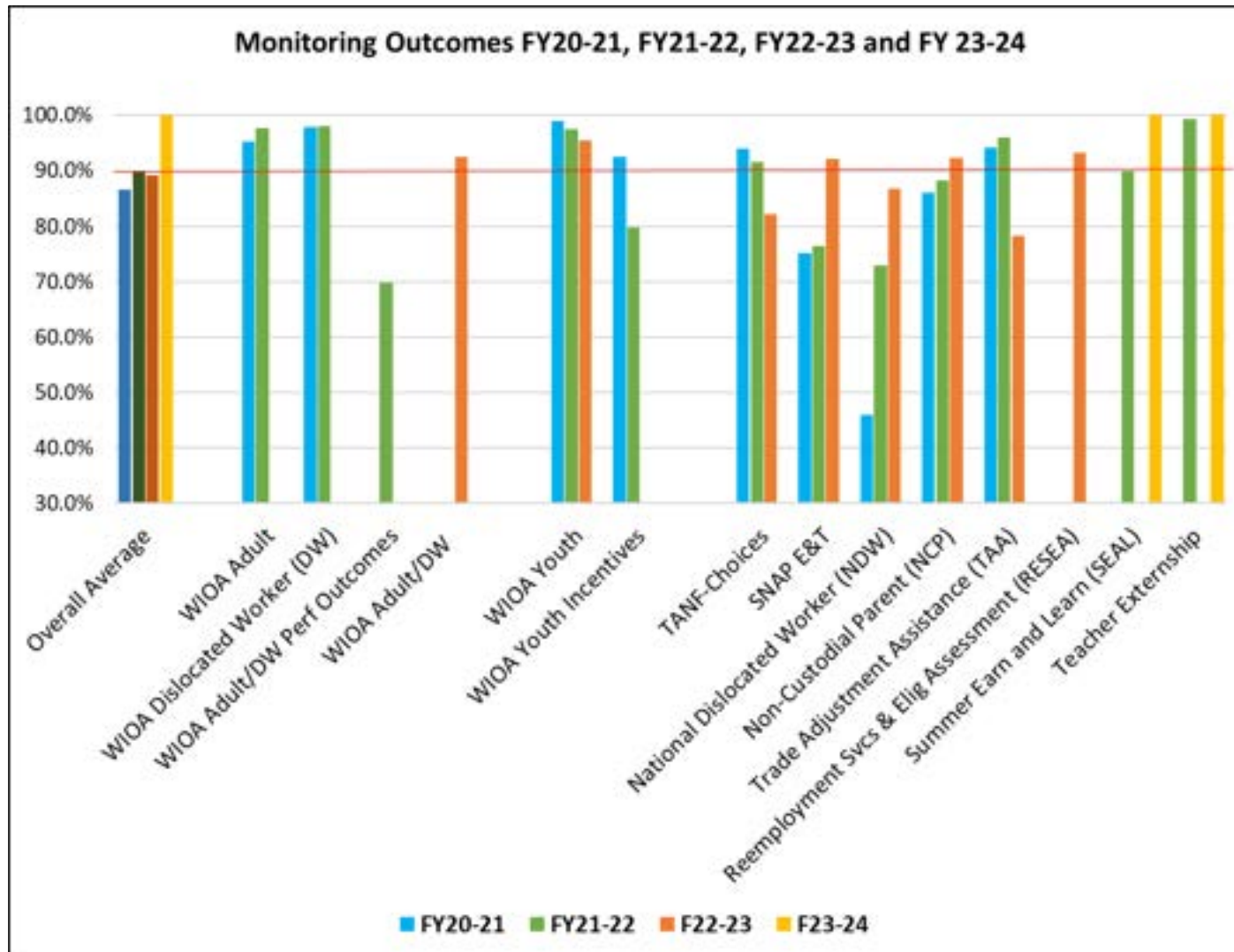
Duration : total days from start to finish (includes some holidays); **Effort (or Work)** : actual number of days spent on each project.

Modification Notes

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



Briefing – Monitoring Outcomes



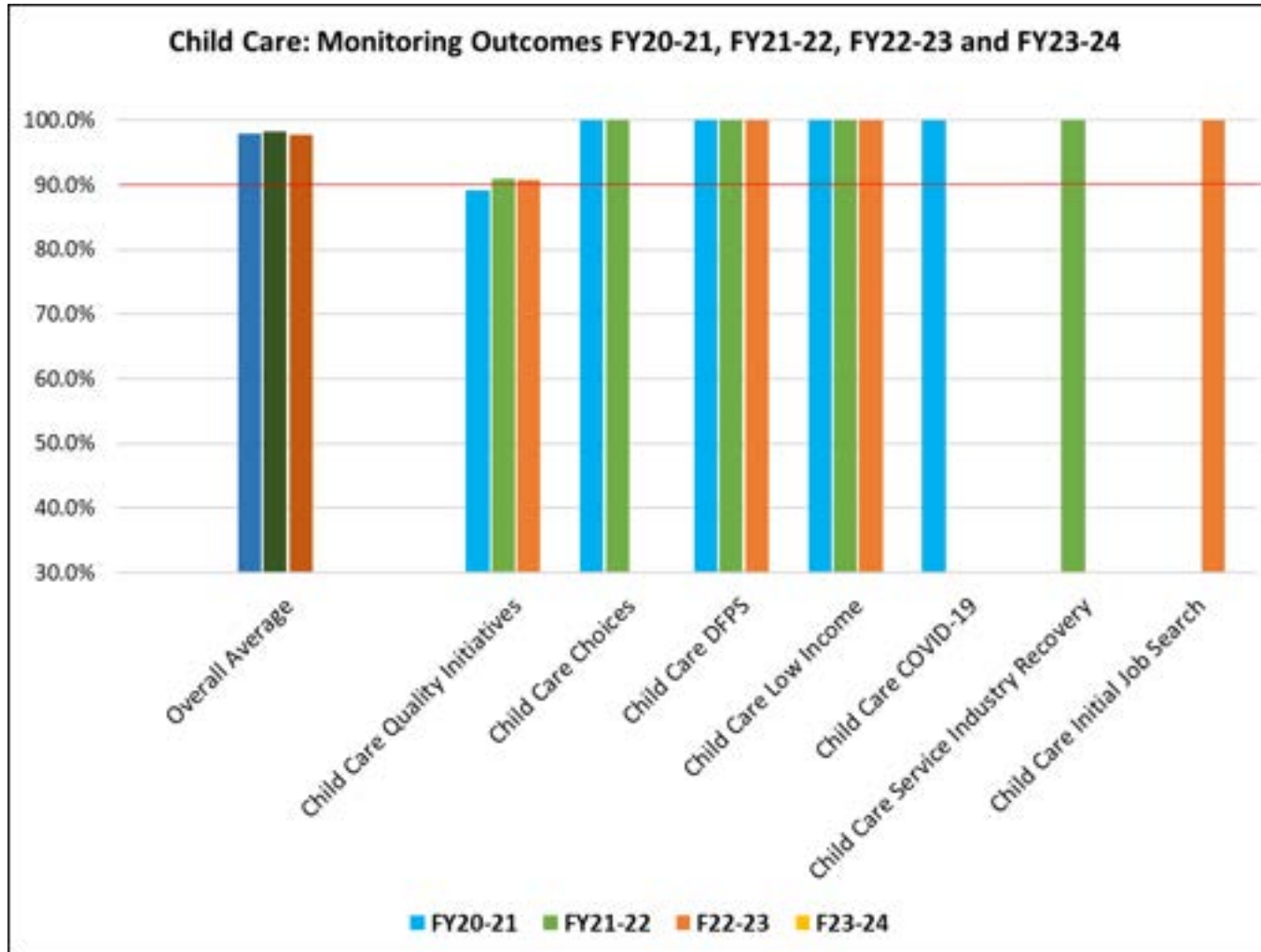
Added: Summer Earn and Learn (SEAL) and Teacher Externship.

The chart summarizes outcomes of monitoring engagements for FY20-21, FY21-22, FY22-23, and FY 23-24.

The red line highlights the 90% expected accuracy rate.



Briefing – Monitoring Outcomes



The chart summarizes outcomes of monitoring engagements for Child Care in FY20-21, FY21-22, FY22-23, and FY 23-24.

The figure does not yet include FY24 outcomes.

The red line highlights the 90% expected accuracy rate.



Update on Contractor Monitoring

TWC requires boards to implement corrective action plans for items with low accuracy rates.

To assist with the process, QA developed a ‘dashboard’ that identifies monitoring trends for each grant for the past 2-3 years, from which board staff have identified several grants with ‘repeat’ findings.

Board staff are currently working on process improvements with contractors for the following grants:

- SNAP, NCP, Choices, TAA, and WIOA Adult/Dislocated Worker.



Continuous Improvement Actions

- Review of policies/procedures, training, monitoring, increased oversight, and documenting progress;
- Board staff review the items during monthly board-contractor meetings and offer technical assistance;
- Board staff develop TEAMS portals to centralize and manage progress and improvement efforts;
- Contractor staff intensify their internal monitoring reviews to focus on attributes that we know TWC will test and submit their monitoring results to board staff regularly;
- QA implements an ‘informal’ regular review/sampling of the attributes in question (the first round is 97% complete);
- Board staff prepare the needed documentation for submission to TWC
 - TWC usually requests the information during the Annual Monitoring to validate the board’s oversight capacity.

Update on Improvements from TWC Annual Monitoring - PII



Lack of Barriers to Protect PII at Reception Area:

- Evaluated each center's VOS greeter process.
- Moved screens facing public and added screen protectors.
- Identified the center challenges at each center and board staff are working to remove those barriers.



Unsecure PII in the Physical Environment:

- Implemented a layered approach for the walkthrough at the centers.
- Board and contractor staff will be performing unannounced walkthrough regularly. QA board staff will perform "formal" final testing.
- Staff training/Technical Assistance will be scheduled for contractors to address the findings.



Update on Improvements from TWC Annual Monitoring - Procurement



TWC – Monitoring Concerns:

- Contracts – Exceeded Budget and Amended Scope of Work.
 - Ensuring amendments of contracts are not outside the original scope, length, and amount unless provided for in the original contract.
- Leases – Required forms were improperly dated for two leases.
 - The forms were added following last year's review per direction provided by TWC Audit Resolution.
- Procurement Processes – Required forms missing or were not completed.
 - Ongoing training for both procurement and board staff.
 - More detailed justification for all contract actions through coordinated memo review process.



TWC Equal Opportunity Monitoring

BACKGROUND:

- Federal regulations requires TWC to monitor compliance with equal opportunity laws.
- The WIOA law also prohibits discrimination based on race, color, religion, sex, national origin, age, disability, political affiliation or belief, or for beneficiaries, applicants, and participants only, on the basis of citizenship status.
- TWC's audit includes a review of our policies/procedures and a thorough assessment of EO and accessibility requirements at center locations.



EO Monitoring Outcomes

The State of Texas Equal Opportunity Officer issued WSA a letter dated 01/09/2024 to report the completion of the review.

TWC's Equal Opportunity Compliance Department (EOCD) reported no findings and no issues.

Recommendations:

Continue supporting the assignment of an EO Officer which TWC requires to oversee the board's EO responsibilities and continue supporting WSA's EO activities to ensure adherence to EO laws.

TWC Performance - # of Employers Receiving Assistance



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

- The Number of Employers Receiving Workforce Assistance.

Definition:

The count/number of employer 'reporting units' served in the WSA area. The performance period runs from October 1st to September 30th.



Goal

- The performance measures the effectiveness of serving employers through a series of activities that help meet local labor demands.
- It captures a mix of services, such as employer penetration or local reach, which focuses on quantity.
- It also focuses on intensity, such as with customized/incumbent worker training or services for specific populations.



Methodology

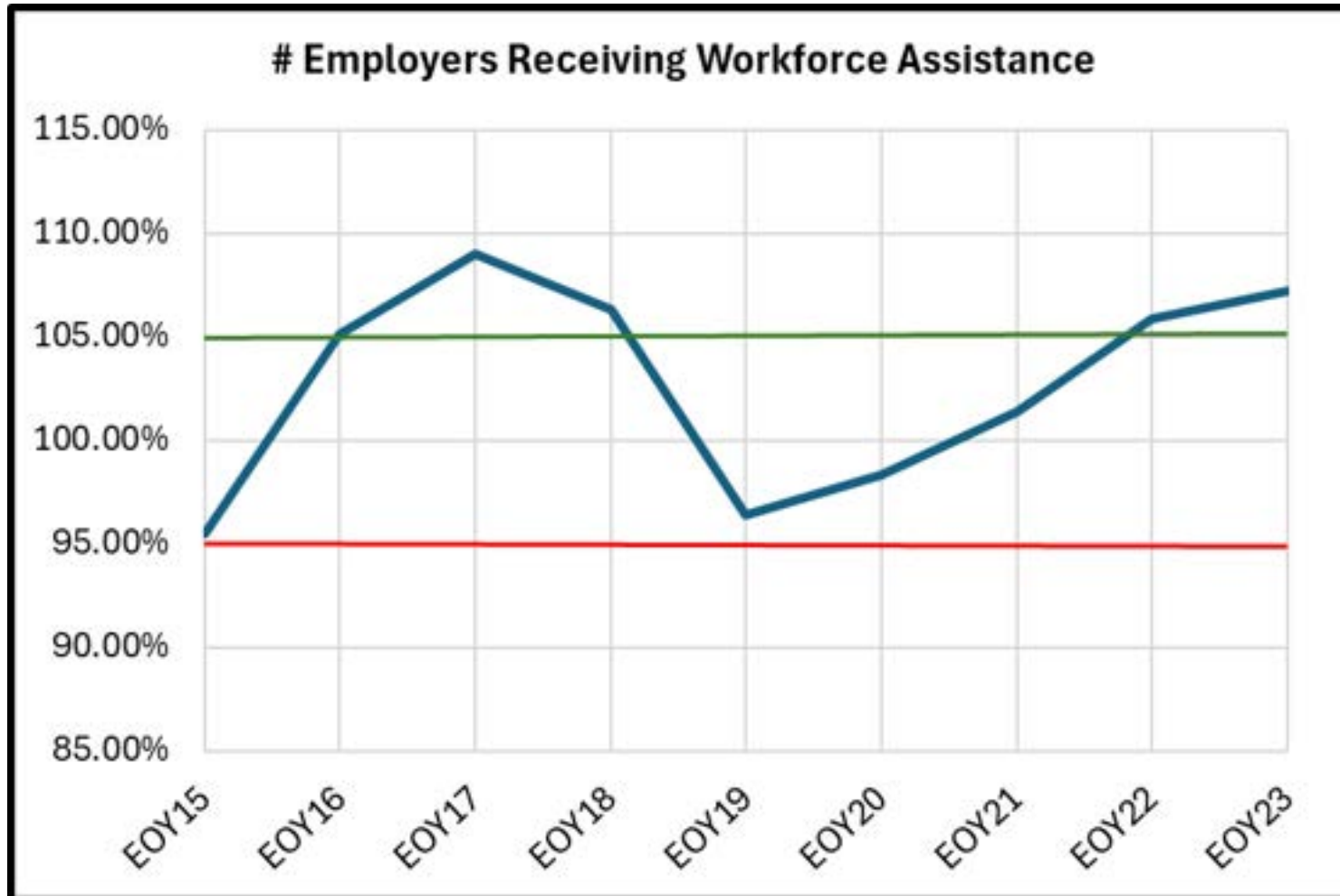
A count of the number of employer locations that receive one of the following services (an employer may have multiple locations):

Job Postings	Specialized testing of job seekers
Site Recruitment	Job Fairs
Offering meeting/interviewing space	Customized/Incumbent Worker training
Subsidized/unsubsidized work agreement	Rapid Response
Job Development	Work Opportunity Tax Credit (WOTC)
Fee for Services	

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



Current & Historical Outcomes



From Sept 2015 to
Sept 2023.

WSA has consistently
met or exceeded the
measure.

Meeting $\geq 95\%$

Exceeding $\geq 105\%$

Source: TWC's MPR



Questions



Thank you!





MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented By: Jeremy Taub, CPPO, Director of Procurement and Contracts

Date: February 9, 2024

Subject: Contract Summary and RFP Updates

Summary: This report is intended to summarize current solicitations and contracts in progress or that the board renewed or intends to renew/execute over a one-hundred eighty-day period. Workforce Solutions Alamo board staff processes contracts, renewals, and amendments, enabling the procurement of goods and services that are reasonable and necessary to administer funds to the greater 13-county Alamo Region. ***Supporting Texas Talent and Economic Growth – Goal 2, Service Optimizers.***

The Workforce Solutions Alamo (WSA) Procurement and Contracts Department is responsible for managing the procurement of goods and services operations. We are committed to conducting procurement acquisitions to the maximum extent practical in a manner providing full and open competition consistent with the standards of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance), and the Texas Workforce Commission Financial Management for Grants & Contract's (FMGC) Property, Procurement & Contract Standards.

Update:

- Contract Listing has been updated to include year-to-date expenditures of term contracts for better spend management and budgetary purposes.
- RFP list below is a summary of procurement projects in process as of January 31, 2024.

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<u><i>Solicitation</i></u>	<u><i>Purchase of</i></u>	<u><i>Opening (estimated)</i></u>	<u><i>Status</i></u>	<u><i>Anticipated Award Date</i></u>
RFP 2023-029	Access Control Equipment	October 2023	Under Contract	February 2024
RFI 2023-015	Lease Property Search (Kerrville)	April 2023	Pending Award	February 2024
RFA 2024-001	Teacher Externships	November 2023	Pending Award	February 2024
RFI 2023-026	Leased Property Search (Hondo)	March 2024	In Progress	July/Sept 2024
RFP 2024-003	Child Care Quality Services	February 2024	In Progress	June 2024
RFP 2024-002	Professional Employer Services (PEO)	January 2024	Open	March 2024
TBD	Evaluator Services for CCQ RFP	February 2024	In Progress	April 2024
RFP 2024-005	Temporary Staffing Services	February 2024	In Progress	April 2024

Alternatives: None.

Fiscal Impact: All budgeted costs were previously approved or were included in recent budget amendments.

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

Next Steps: Procurement and Contracts Management proactively monitors contracts for an effort in identifying new opportunities for purchasing goods and services to leverage cost savings to WSA in support of the local plan and the mission of Workforce Solutions Alamo.

Attachments: Active contract listing with year-to-date spend and lease schedule.

SERVICES	Vendor	Estimated Yearly	Spend to Date	Remaining of Budget	Percentage
1YR VMWARE LICENSE-Virtualiztion Server	COMPUTER SOLUTIONS	\$31,546.00	\$ 31,524.68	\$21.32	<div><div>100%</div></div>
3YR VMWARE LICENSE-Virtualiztion Server	COMPUTER SOLUTIONS	\$10,572.72	\$ 10,572.72	\$0.00	<div><div>100%</div></div>
3YR WEBEX LICENSES - Web conferencing	Barcom Enterprises LLC.	\$10,440.00	\$ 10,440.00	\$0.00	<div><div>100%</div></div>
Adobe Pro and Creative Licenses	Consistent Computer Bargain	\$1,452.00	\$ 1,452.00	\$0.00	<div><div>100%</div></div>
Adult Services	C2 Global Professional Services, LLC	\$19,505,317.00	\$ 811,055.96	\$18,694,261.04	<div><div>4%</div></div>
Applicant Tracking System	Breezy	\$8,644.00	\$ -	\$8,644.00	<div><div>0%</div></div>
APPSPACE 24MOS DIGITAL SIGNS	PRESIDIO	\$29,700.00	\$ -	\$29,700.00	<div><div>0%</div></div>
ArcGIS-Mapping Software	ESRI	\$200.00	\$ 200.00	\$0.00	<div><div>100%</div></div>
Architect and Space Planning Services	LK Design Group Inc.	\$150,000.00	\$ 93,367.79	\$56,632.21	<div><div>62%</div></div>
Biomed Membership	Biomed SA	\$1,000.00	\$ 1,000.00	\$0.00	<div><div>100%</div></div>
Board Book Subscription	Board Book	\$4,000.00	\$ 4,000.00	\$0.00	<div><div>100%</div></div>
Boardroom Digital Display	DTS	\$6,840.00	\$ -	\$6,840.00	<div><div>0%</div></div>
Boerne Chamber of Commerce Membership	Boerne Chamber of Commerce	\$200.00	\$ 200.00	\$0.00	<div><div>100%</div></div>
Cabinet SafeManagement	Gallion	\$47,545.35	\$ 47,545.35	\$0.00	<div><div>100%</div></div>
CFO Augmentation Services	Collective Strategies	\$270,000.00	\$ 60,000.00	\$210,000.00	<div><div>22%</div></div>
Child Care Management Services	City of San Antonio, Department of Human	\$121,653,545.00	\$ -	\$121,653,545.00	<div><div>0%</div></div>
Child Care Quality Improvement Activity	The City of San Antonio (COSA)	\$3,935,196.00	\$ -	\$3,935,196.00	<div><div>0%</div></div>
Cisco Wireless Access Point Support- Pearsall	Barcom Enterprises LLC.	\$71.77	\$ 71.77	\$0.00	<div><div>100%</div></div>
Cognito Forms Enterprise License	Cognito	\$1,257.60	\$ 1,257.60	\$0.00	<div><div>100%</div></div>
Cognito Forms Enterprise License	Cognito	\$2,451.00	\$ 1,181.00	\$1,270.00	<div><div>48%</div></div>

SERVICES	Vendor	Estimated Yearly	Spend to Date	Remaining of Budget	Percentage
Commercial Insurance Broker	SWBC Insurance	\$0.00	\$ -	\$0.00	#DIV/0!
Commercial Janitorial Services	M & Rs Elite Janitorial Solutions	\$213,520.00	\$ 54,375.28	\$159,144.72	<div><div></div></div> 25%
Commerical Real Estate Broker	PCR Brokerage San Antonio LLC	\$0.00	\$ -	\$0.00	#DIV/0!
Compliance Hotline Provider	Lighthouse Services	\$286.00	\$ 286.00	\$0.00	<div><div></div></div> 100%
Data Analytic Software	LightCast	\$19,500.00	\$ -	\$19,500.00	0%
Digital Marketing Services	WebHead Technologies	\$46,786.00	\$ 39,937.04	\$6,848.96	<div><div></div></div> 85%
Document Destruction	Shred-It (Stericycle)	\$15,000.00	\$ 7,619.24	\$7,380.76	<div><div></div></div> 51%
Domain-WSAlamo.org	Go Daddy	\$64.32	\$ 64.32	\$0.00	<div><div></div></div> 100%
E FAX for SAFB Location	Nextivia	\$278.00	\$ 211.75	\$66.25	<div><div></div></div> 76%
Electrical Services	All Star Electric	\$24,400.00	\$ 2,118.90	\$22,281.10	<div><div></div></div> 9%
Email outreach software	Constant Contact	\$9,252.60	\$ 9,252.60	\$0.00	<div><div></div></div> 100%
E-Signature Software	DocuSign	\$45,208.80	\$ -	\$45,208.80	0%
Event Management Software	EventBrite	\$954.00	\$ -	\$954.00	0%
Executive and Professional Recruitment Service	Tranquil Multi Dynamic Advisory LLC	\$40,264.00	\$ -	\$40,264.00	0%
Financial Audit Services	ABIP, PC	\$67,050.00	\$ -	\$67,050.00	0%
Fire and Burglar Monitoring DP	ADT	\$683.40	\$ -	\$683.40	0%
Fire and Burglar Monitoring SF	ADT	\$1,452.00	\$ -	\$1,452.00	0%
Fiscal Monitoring	Christine H Nguyen, CPA	\$149,265.00	\$ 129,705.00	\$19,560.00	<div><div></div></div> 87%
Gazelle Software	Abila	\$12,075.00	\$ 12,075.00	\$0.00	<div><div></div></div> 100%

SERVICES	Vendor	Estimated Yearly	Spend to Date	Remaining of Budget	Percentage
Grant Writer Services	TJD Consulting	\$19,600.00	\$ 1,050.00	\$18,550.00	<div><div></div></div> 5%
GRAPHIC DESIGN SOFTWARE	Canva	\$119.40	\$ 119.40	\$0.00	<div><div></div></div> 100%
Guard Services	Vets Securing America	\$369,576.00	\$ 275,677.15	\$93,898.85	<div><div></div></div> 75%
Hondo Wireless Internet	AT&T	\$903.24	\$ -	\$903.24	<div><div></div></div> 0%
HVAC PM Services	Fixya Air, LLC	\$45,000.00	\$ 15,043.00	\$29,957.00	<div><div></div></div> 33%
IT Cloud Services	Freeit Data Solutions, Inc.	\$98,266.00	\$ 98,266.00	\$0.00	<div><div></div></div> 100%
IX-3 Postage Meter	Quadient	\$4,017.00	\$ 2,471.76	\$1,545.24	<div><div></div></div> 62%
Job Placement and Worksite Monitoring Services	Professional Contract Services Inc.	\$180,000.00	\$ -	\$180,000.00	<div><div></div></div> 0%
Karnes City Chamber of Commerce	Karnes City Chamber of Commerce	\$50.00	\$ 50.00	\$0.00	<div><div></div></div> 100%
Language Interpreter Services	Universal Technical Translation	\$4,050.00	\$ -	\$4,050.00	<div><div></div></div> 0%
Leased Copier and Supplies-S Flores	Xerox Financial Services	\$23,582.00	\$ 20,045.04	\$3,536.96	<div><div></div></div> 85%
Leased Copier and Supplies-various locations	Xerox Financial Services	\$186,035.00	\$ 145,727.00	\$40,308.00	<div><div></div></div> 78%
Leased Copier and Supplies-various locations	Xerox Financial Services	\$62,220.00	\$ 40,518.00	\$21,702.00	<div><div></div></div> 65%
Leased Copier and Supplies-Xerox C9070	Xerox Financial Services	\$30,420.00	\$ 19,773.00	\$10,647.00	<div><div></div></div> 65%
Legal Services	Martin & Drought, P.C.	\$90,000.00	\$ -	\$90,000.00	<div><div></div></div> 0%
Locksmith	Crites Downtown Lock and Key	\$2,500.00	\$ -	\$2,500.00	<div><div></div></div> 0%
Maintenance Handyman Services	360TXC LLC.	\$13,860.00	\$ 9,392.00	\$4,468.00	<div><div></div></div> 68%
Marketing & Outreach Services	Texas Creative	\$100,000.00	\$ 83,570.68	\$16,429.32	<div><div></div></div> 84%
Mat Rentals	Service Uniform	\$19,000.00	\$ 11,153.00	\$7,847.00	<div><div></div></div> 59%

SERVICES	Vendor	Estimated Yearly	Spend to Date	Remaining of Budget	Percentage
Membership to Bandera Chamber of Commerce	Bandera Chamber of Commerce	\$250.00	\$ -	\$250.00	0%
Membership to Hondo Chamber of Commerce	Hondo Chamber of Commerce	\$150.00	\$ -	\$150.00	0%
Membership to SA Women Chamber of Commerce	SA Womens Chamber of Commerce	\$200.00	\$ -	\$200.00	0%
Microix Support & Maintence	MICROIX	\$3,673.75	\$ 3,673.75	\$0.00	100%
Microsoft Office 365 Software License	CONSISTENT COMPUTER BARGAIN	\$36,957.60	\$ 36,957.60	\$0.00	100%
MIP Maintenance & Support	Abila	\$16,185.69	\$ 16,185.69	\$0.00	100%
Monitoring, Targeting and Reporting	Agility PR Solutions	\$24,778.00	\$ 24,778.00	\$0.00	100%
Moving Services	Scobey Moving & Storage, LTD.	\$25,000.00	\$ 1,704.45	\$23,295.55	7%
National Association Workforce Board	NAWB	\$3,000.00	\$ 3,000.00	\$0.00	100%
Network and Voice Management Services	Barcom Enterprises LLC.	\$122,376.00	\$ -	\$122,376.00	0%
Netwrix Auditor for Active Directory/File Servers	FreeIT Data Solutions, Inc	\$6,103.50	\$ 6,103.50	\$0.00	100%
NEWSLETTER SUBSCRIPTION	THE BOERNE STAR	\$65.00	\$ 65.00	\$0.00	100%
Nimble Support Services	FreeIT Data Solutions, Inc	\$7,172.00	\$ 7,172.00	\$0.00	100%
North San Antonio Chamber of Commerce	NORTH SA COC	\$1,500.00	\$ 1,500.00	\$0.00	100%
Pearsall Lawn Services	Arriazola Lawn Care	\$600.00	\$ -	\$600.00	0%
Pest Control Services	Orkin LLC	\$7,982.00	\$ 483.00	\$7,499.00	6%
Pleasanton Express Newspaper	Pleasanton Express	\$40.00	\$ 40.00	\$0.00	100%
Plumbing Services	1st Aid Plumbing	\$30,000.00	\$ 410.00	\$29,590.00	1%
Postage Machine Lease: NB, MB, EG, SF, SG, KV, WZ, DP	Pitney Bowes	\$7,017.00	\$ -	\$7,017.00	0%
Printer Leases	DOCUmentation	\$32,697.00	\$ -	\$32,697.00	0%

SERVICES	Vendor	Estimated Yearly	Spend to Date	Remaining of Budget	Percentage
Procurement Platform	Bonfire	\$74,849.97	\$ 49,899.98	\$24,949.99	<div><div></div></div> 67%
Professional Employer Organization	SWBC	\$20,000.00	\$ -	\$20,000.00	<div><div></div></div> 0%
Program Monitoring Services	Christine H Nguyen, CPA	\$7,482.00	\$ -	\$7,482.00	<div><div></div></div> 0%
QR Code Software	Open Team	\$223.30	\$ 223.30	\$0.00	<div><div></div></div> 100%
RTW- Intake, Assesment and Case Management	Avance PCEP School based	\$1,993,839.00	\$ 100,907.52	\$1,892,931.48	<div><div></div></div> 5%
RTW- Intake, Assesment and Case Management	Chrysalis Ministries	\$5,376,545.00	\$ 830,081.74	\$4,546,463.26	<div><div></div></div> 15%
RTW- Intake, Assesment and Case Management	ECE at Texas A&M University	\$674,090.00	\$ 86,522.92	\$587,567.08	<div><div></div></div> 13%
RTW- Intake, Assesment and Case Management	Family Services Assocation of SA	\$9,432,421.00	\$ 95,379.73	\$9,337,041.27	<div><div></div></div> 1%
RTW- Intake, Assesment and Case Management	San Antonio Food Bank	\$6,740,910.00	\$ 602,578.53	\$6,138,331.47	<div><div></div></div> 9%
RTW- Intake, Assesment and Case Management	The City of San Antonio (COSA)	\$102,390,463.00		\$102,390,463.00	<div><div></div></div> 0%
RTW- Intake, Assesment and Case Management	YWCA Olga Madri Center	\$5,280,206.00	\$ 391,708.49	\$4,888,497.51	<div><div></div></div> 7%
SA Chamber of Commerce Membership	SA Chamber of Commerce	\$602.00	\$ 602.00	\$0.00	<div><div></div></div> 100%
SAGE ASSEST LICENSE & SUPPORT	SAGE	\$7,543.00	\$ 7,543.00	\$0.00	<div><div></div></div> 100%
Sales and Service Cloud Enterprise	Salesforce Inc	\$614.00	\$ 576.00	\$38.00	<div><div></div></div> 94%
Security Operations Center (SOC) Services	FreeIT Data Solutions, Inc	\$103,626.00	\$ 103,625.58	\$0.42	<div><div></div></div> 100%
Social Media Scheduling Tool Subscription	HOOTSUITE	\$455.00	\$ 229.95	\$225.05	<div><div></div></div> 51%
Storage Facility	SafeSite	\$16,510.00	\$ 17,428.50	(\$918.50)	<div><div></div></div> 106%
SWBCU Online Training Services for Staff	Southwest Business Corporation (SWBC)	\$3,000.00	\$ 1,225.00	\$1,775.00	<div><div></div></div> 41%
Teacher Externships	Alliance for Technology Education In Applied	\$162,500.00	\$ -	\$162,500.00	<div><div></div></div> 0%
Temporary Staff Services	LK Jordan	\$75,000.00	\$ 61,484.04	\$13,515.96	<div><div></div></div> 82%

SERVICES	Vendor	Estimated Yearly	Spend to Date	Remaining of Budget	Percentage
Temporary Staffing Services	Human Capital International, LLC dba	\$75,000.00	\$ 20,297.80	\$54,702.20	 27%
Vistana Front Doorbell Service Agreement	ADT LLC	\$1,019.00	\$ 108.00	\$911.00	 11%
Walzem Burglar Alarm System Services	True Protection LLC	\$1,848.00	\$ 559.84	\$1,288.16	 30%
Web Based IT staff Training	Solid Border	\$9,815.00	\$ 9,814.59	\$0.41	 100%
Website Operation and Maintenance Support	WebHead Technologies	\$40,614.00	\$ 40,614.00	\$0.00	 100%
Work Number Services Employment and SSN Verification Services	Carahsoft Technology	\$70,000.00	\$ -	\$70,000.00	0%
Youth Services	Serco of Texas Inc.	\$2,785,000.00	\$ 724,499.60	\$2,060,500.40	 26%



MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented By: Jeremy Taub, CPPO, Director of Procurement and Contracts

Date: February 9, 2024

Subject: Update on Implementation of Recommendations from the Procurement Consultant

Summary: Workforce Solutions Alamo Board Procurement staff contracted with a procurement consultant, The Syndicate Wave, LLC. This report is intended to summarize procurement processes and improvements the board has implemented to improve processes and efficiencies. *Supporting Texas Talent and Economic Growth – Goal 2, Service Optimizers.*

Updates: The procurement process improvements have been ongoing since October 2022, and are 91% complete with final implementation expected to be completed this year.

- Remaining items include, and are expected to be fully implemented by the end of 2024:
 - Certifications for all Procurement Staff
 - Strategic Plan
 - Reporting and Spend Management

Analysis: The independent consultant assessed the procurement area, identifying several required vital control needs. WSA and The Syndicate Wave, LLC collectively finalized all enhancements and Procurement and Contract Management has continued actively implementing these recommendations.

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Next Steps: Procurement and Contracts Management will continue monitoring compliance, embracing a continuous process improvement culture, implementing the remaining recommendations from the assessment.

Fiscal Impact: Strengthening controls will ensure full compliance and guard against future questioned costs. Additionally, it's anticipated these controls will yield more significant cost-savings and contract negotiation positions.

Timeline: Expected to be fully implemented by the end of 2024.

Attachments: None.



Procurement & Contracts Management

Oversight Committee



Procurement and Contracts Update

February 9, 2024

Jeremy Taub, CPPO

Director of Procurement and Contracts



Contract Summary and RFP Updates



<u>Solicitation</u>	<u>Purchase of</u>	<u>Opening (estimated)</u>	<u>Status</u>	<u>Anticipated Award Date</u>
RFP 2023-029	Access Control Equipment	October 2023	Under Contract	February 2024
RFI 2023-015	Lease Property Search (Kerrville)	April 2023	Pending Award	February 2024
RFA 2024-001	Teacher Externships	November 2023	Pending Award	February 2024
RFI 2023-026	Leased Property Search (Hondo)	March 2024	In Progress	July/Sept 2024
RFP 2024-003	Child Care Quality Services	February 2024	In Progress	June 2024
RFP 2024-002	Professional Employer Services (PEO)	January 2024	Open	March 2024
TBD	Evaluator Services for CCQ RFP	February 2024	In Progress	April 2024
RFP 2024-005	Temporary Staffing Services	February 2024	In Progress	April 2024



Update on Implementation of Recommendations from the Procurement Consultant

The procurement process improvements ongoing since October 2022 are 90% complete with final implementation expected to be completed this year.

- Open items:
 - Certifications for all procurement staff.
 - Implement Strategic Plan for Procurement and Contracts.
 - Enhance Reporting and Spend Management.
- Completed items:
 - The Procurement SOPs and Policy have been implemented.
 - Proactively monitoring contracts for timely renewals and procurement cycling.
 - Ongoing monthly training is provided to board staff on procurement processes and contract management.
 - Improved Procurement File Retention.



Questions



Thank you!





MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented By: Teresa Chavez, COO

Date: February 9, 2024

Subject: Performance, Programs, and Operational Updates

Performance: Board contract 2023 end of the year MPR report shows WSA meeting all measures except for the Claimant Reemployment within 10 weeks. Boards are waiting for the TABLAU system to be rolled out to see if this is going to change the final numbers for this measure.

Workforce Center Certification: As of December 20, 2023, 16 WSA workforce centers have been certified by TWC according to WIOA Workforce Center Requirements. The centers that have been certified are Hondo, Pleasanton, Seguin, Kerrville, Bandera, Pearsall, Boerne, New Braunfels, Fredericksburg, Floresville, Kennedy, Walzem, Marbach, South Flores, East Houston, and DataPoint. Staff has submitted a Y-9 form for Tilden, Bexar County Justice Center, Military Support at JBSA, and San Antonio Food Bank. Y-9 form is a form that must be submitted to TWC before a center can be considered to go through the WIOA certification.

Child Care Performance: Childcare is trending at 91.38% for children served. December's unofficial year to date average is 11,311. TWC (Texas Workforce Commission) has set Alamo's 2024 performance target at 12,378. Childcare staff are actively enrolling and pulling families from waitlist.

Child Care Quality: At the beginning of January, our board had 181 Texas Rising Star certified centers, 34% from Bexar and 19% from Rural, for a total of 31% for our board area. Mentors continue to partner with external organization coaches to support and assist Early Learning programs preparing for Texas Rising Star certification.

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Special Grants & Other Initiatives:

Summer Earn and Learn: Employer Recognition Event on January 12, 2024, was successful and earned airtime on News 4. Commissioner Joe Esparza representing employers joined and enjoyed the excitement that the event created. The community referral link is active and will begin to receive youth through outreach events attended by WSA staff and partners.

Student Hireability Navigators: Navigators have increased Rural presence for Transitional Services towards Vocational Rehabilitation Awareness and Career Exploration activities at the Youth Expo on January 10, 2024, and Northeast Lakeview College Youth Summit activities on Jan 19th and 26th. Over 400 young adults and educators received information on Labor Market Career Information and Modules.

Training and Employment Navigator Pilot: During the past program quarter (Q7) there were 16 active enrollments and 49 total YTD participants. The new grant period will start from 02/01/24 to 10/30/25.

Military Family Support Program (MFSP): Currently, there are 31 total YTD participants, 4 in training, and 7 receiving support services. The new program year started on 01/01/24 to 12/31/24.

Middle Skills Pilot – Gears for Careers: This grant ends in March. This is to assist individuals with support services when entering new employment.

Re-Employment Services and Eligibility Assessment (RESEA): According to the last TWC RESEA report, WSA is meeting performance at 95.5%. The required rate is 80% to provide RESEA services within 7 days.

Workforce Commission Initiatives - FY2023: Texas Veterans Leadership Program is one of the WCI programs within this grant. Others include Red, White, And You! and Jobs Y'all. As of last month, the TVL program staff have attended three Job Fairs. Staff reached out to 226 veterans through email or phone and 24 applications were submitted for the Work Opportunity Tax Credit program.

WIOA Youth: WSA continues to work with the youth contractor, SERCO, as they monitor and process enrollments. WSA maintains ongoing communication with the youth contractor on TWC's performance goal range of meeting performance at 95-105% and to remain within the allocated budget.



The yearly goal for Urban In-School and Out-of-School Youth is 306 and is currently at 15% met with 45 enrolled youth. This is the trending enrollment for the beginning of a new program year. The yearly goal for Rural In-School and Out-of-School Youth is 88 which is currently at 32% met with 28 youth enrolled, again the trending enrollment for the beginning of a new program year. The current total of active WIOA youth participants is 73. Services provided in alignment with the 14 elements consist of Occupational/Vocational Training at 36% of measures met, Work Experience at 8% measures met (this increases tremendously in the summer months), and Supportive Services with 73% measures met.

Section 5.5 in the Workforce Commission Initiatives (WCI) Grant Statement of Work requires that WSA utilize TANF grant funds distributed to the workforce area to support the agency's Jobs Y'all events for middle school, high school, and postsecondary students. The events should invite employers to participate in a relevant way to help students explore career opportunities in their industries. Student participation should encourage exploration of career opportunities including understanding pathways to in-demand careers, networking, internships, and other applied learning opportunities. Parents should also be invited to attend with their children to discuss their special role in career exploration. Events shall be held using the branding of Jobs Y'all and may include board-specific branding. Boards have the ability to locally determine dates.

For FY2024, WSA will continue to shift from one large event to several smaller, industry focused events, in addition to the cohosting of youth events to reach a higher number of students and leverage resources. This will support the engagement of youth at different locations, including both rural and urban areas, and the targeting of a variety of industries and youth sub-populations. In addition, it will provide youth opportunities to attend multiple events over the course of the year and provide a greater variety of career exploration, resources, and employer interactions.

Jan 10, 2024 - Rural Co-hosted Event: Seguin Youth Career Expo

- Held at Seguin City Coliseum in Seguin, Texas from 9am-1pm
- 820 youth, 32 employers/community organizations in attendance
- Industry-focused for all industries

The Seguin Youth Career Expo was an interactive and dynamic experience that facilitated a connection between 8th grade students, their Career & Technical Education (CTE) pathways and local companies. A stronger partnership was developed between the Seguin EDC. The short-term goal was to inspire before they choose their CTE pathway in high school. The long-term goal was to connect employers to their future workforce and help students make



informed, inspired decisions about their careers after high school, whether they choose a four-year university, community college, or apprenticeship training center.

January 19th and 26th 2024 – Urban Event: Future Ready Summit

- Held at Northeast Lakeview College
- College and Career Readiness
- Goal: 1,000 youth (350 Juniors attended Jan 19th)

The Future Ready Summit is meant to help students in their final years of high school to gather resources to prepare them for life after graduation. Students had the opportunity to learn about career pathways in workshop sessions and meet with employers.

April – Rural Event: Lytle High School

- Planning in Progress

August – Urban Event: Alamo Colleges District

- Planning in Progress

Work Experience opportunities exist in both urban and rural areas and are available to youth ages 16-24. Work experience data through 1/23/24 is as follows: 164 current WEX agreements, 599 WEX positions available, 365 participant WEX enrollment target, and 47 current participants enrolled in WEX to date.

SA Ready to Work: Finalized all seven subprime contracts.

- Ready to Work is a one-of-a-kind program to help San Antonio residents find easy access to education and quality jobs. WSA is the largest funded COSA partner at \$105,781,953.00 and includes 7 subgrantees providing case management, training/certification, and job placement. Ready to work is funded by a 1/8 cent sales and use tax collected through December 2025.
- Year to date WSA has completed intake for 4,363 and 2,609 individuals are case managed/enrolled in training with 299 completing their training. 141 participants have gained employment and earn more than \$15.00 per hour. The average wage of those graduates securing employment has increased from \$16.00 to \$17.24, above the requirement. The top training courses being selected are medical, IT, and construction. *Data is from 12-12-23.
- Placement: We have been addressing placement challenges and have developed strategies to help improve our numbers. WSA has established a Placement Committee



with meetings twice a month to focus on improving placement outcomes, sharing employer leads and building relationships among sub-agencies, collaboration to provide participant advice for individuals who are challenging to place, building support for sub agencies, especially those new to the placement process, and maintaining a consortium presence at Housing Trust sites and Joint Base San Antonio (JBSA) in alignment with the MOU.

- The new data platform, SYNC, is currently in use. However, there have been some issues related to data migration and reports. WSA has maintained constant communication with COSA to address these concerns, and efforts are underway to resolve the issues. Reports are expected to be available in the coming weeks, and Phase 2 updates are anticipated to be ready within the next month or two.
- The majority of our subagencies have requested additional SYNC training. We will be providing TEAMS or in-person training to accommodate the different learning styles of individuals. We will continue to offer the same type of support, including email and phone call assistance, once the new reporting system is available.
- We continue to address recommendations from the Process Improvement Plan and Technical Assistance Review 2, and our numbers indicate an improvement since the time of the PIP/TAR2 assessment.
- The Official Audit completed by COSA's Daniel Zuniga has not been received, however, we anticipate the following areas to be included based on verbal feedback: 3 case files pulled for review concluded clients were not entered in Work in Texas (WIT) or not being documented in Signify correctly and 1 case file had no documentation that follow up was done while client was in training.

TANF Initiative Proposal: The proposal has been approved by the state and WSA is prepared to utilize 10% of TANF funding for prevention programs focused on inspiring young people's interest through a unique STEM opportunity and engage with industry employers through a 12-week summer program. This program would seek to enroll 200 youth, ages 16-24, and would begin May 2023 through August 2023.

Fiscal Impact: No additional fiscal impact currently.

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



Next Steps: Move forward with items recommended on Ready to Work Placement Committee meetings, additional Sync training, and Training Provider workshop. Continue to monitor program outcomes, budgets, and working collaboratively with the data team to understand program data to enhance services for job seekers and employers. As initiatives sunset, teams are reviewing new opportunities to secure funding supporting the WSA sector-based model.



MEMORANDUM

To: Oversight Committee

From: Adrian Lopez, CEO

Presented By: Teresa Chavez, COO

Date: February 9, 2024

Subject: Unemployment Insurance Weekly Work Search Contact Requirement

Summary: The Wagner-Peyser Act requires that the state unemployment compensation system administer work test requirements. Texas Labor Code §207.021 requires UI claimants to register for work, to demonstrate the ability to work, and to be available for work. UI claimants must actively seek suitable work by making a minimum of three work search contacts per week. Commission rule allows boards to require more than three work search contacts per week, based on a local labor market information analysis. The board must review the analysis and approve the recommended UI weekly job search requirements.

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

Alternatives: None.

Fiscal Impact: None.

Recommendation: An analysis was conducted reviewing U.S. Census demographics, Local Area Unemployment Statistics (LAUS), and industry employment growth (% and # change) data by county. WSA also reviewed a comparison of job search requirements by county for other large boards. WSA staff recommends that the weekly work search contact requirements remain at 5 for all counties. Recommendation is based on the unemployment rate of 3.2% for

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the region, and UI rates \leq 3.2 in twelve of thirteen counties in November of 2023. Also, QCEW industry employment comparison for Q2 2022 and 2023 indicated an employment growth for all WSA counties of 34,765 with a 3.1% change over the year.

Next Steps: If approved, TWC will be notified of the required weekly job search contacts. Claimants are required to keep a log that may be used to validate their job search. WSA will issue a policy record to the adult contractor for continued implementation.



MEMORANDUM

To: Oversight Committee Memo

From: Adrian Lopez, CEO

Presented By: Teresa Chavez, COO

Date: February 9, 2024

Subject: Workforce Center Certifications

Summary: As of December 20, 2023, 16 WSA workforce centers have been certified by TWC according to WIOA Workforce Center Requirements. The centers that have been certified are Hondo, Pleasanton, Seguin, Kerrville, Bandera, Pearsall, Boerne, New Braunfels, Fredericksburg, Floresville, Kennedy, Walzem, Marbach, South Flores, East Houston and DataPoint. Staff has submitted a Y-9 form for Tilden, Bexar County Justice Center, Military Support at JBSA and San Antonio Food Bank. Y-9 form is a form that must be submitted to TWC before a center can be considered to go through the WIOA certification.

Analysis: This certification assists WSA to be in compliance with WIOA requirements as well as with TWC requirements. All workforce boards are required to have at least one comprehensive center, which is DataPoint, and as many affiliate sites as needed. Comprehensive center is where all required workforce partner programs and services are available, either physically co-located or through direct linkage. An affiliate site is a Workforce Solutions Office where job seekers and employers can access the programs, services, and activities of one or more workforce partners and where the operation of the Workforce Solutions Office adds a cost to the board's operational budget, or the board is responsible for oversight and management of the center.

Alternatives: None.

Fiscal Impact: None.

Recommendation: None.

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Next Steps: Mark our calendars for the next workforce center certification which will be three years from now. Once we receive the approved Y-9 forms for the other locations we can save them for the next workforce center certification date to submit them for certification.

Texas Workforce Commission

A Member of Texas Workforce Solutions

Bryan Daniel, Chairman
Commissioner Representing
the Public

Alberto Treviño III
Commissioner Representing
Labor

Joe Esparza
Commissioner Representing
Employers

Edward Serna
Executive Director

December 20, 2023

Mr. Adrian Lopez
Chief Executive Officer
100 N. Santa Rosa St., Suite 120
San Antonio, Texas 78207

Dear Mr. Lopez:

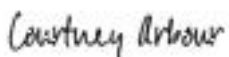
We are pleased to notify you that the Workforce Solutions Offices overseen by the Workforce Solutions Alamo (Board) meet the standards required by the Workforce Innovation and Opportunity Act (WIOA). Once every three years, the Texas Workforce Commission's (TWC) review team verifies that the Workforce Solutions Offices in each local workforce development area (workforce area) meet the WIOA standards.

TWC commends the Board for providing high-quality services to customers in its local workforce area. As a partner of the American Job Center Network, your Workforce Solutions Offices serve as a critical source of assistance for job seekers, employees who want to advance in their careers, and employers that need human resource assistance. The Board's commitment, hard work, and dedication add value to our workforce system.

Additionally, please share with your staff our sincere appreciation for helping TWC complete the review. We look forward to continuing to work as partners with you to meet the needs of employers and job seekers in your community.

If you have questions or need assistance, please contact Shunta Williams, Deputy Director, Board Support & Agency Administered Programs, at (512) 516-0030 or shunta.williams@twc.texas.gov.

Sincerely,



Courtney Arbour, Director
Workforce Development Division

cc: Ms. Leslie Cantu, Board Chair, Workforce Solutions Alamo
Ms. Shunta Williams, Deputy Director, Board Support & Agency Administered Programs, TWC