City of San Antonio

Minutes
Economic and Workforce Development Committee

2025 – 2029 Council Members
Chair: Phyllis Viagran, Dist. 3
Terri Castillo, Dist. 5 | Ric Galvan, Dist. 6
Ivalis Meza Gonzalez, Dist. 8 | Misty Spears, Dist. 9

Monday, August 31, 2026 **10:00 AM** **City Hall**

The Economic and Workforce Development Committee convened a regular meeting in the City Hall Council Briefing Room beginning at 10:38 a.m. Assistant City Clerk Jamie Nieto took the Roll Call noting a quorum with the following Committee Members present:

Members Present: Viagran, Castillo, Galvan, Meza Gonzalez
Members Absent: Spears

Approval of Minutes

1. Approval of the minutes from the Economic and Workforce Development Committee meeting on May 26, 2026

   Councilmember Galvan moved to Approve. Councilmember Meza Gonzalez seconded the motion. The motion carried by the following vote:

   Aye: Viagran, Castillo, Galvan, Meza Gonzalez
   Absent: Spears

Public Comments

Consent Agenda

2. Recommend the Workforce Solutions Alamo FY 2027 Operating Budget, in the amount of $195,380,770, to the full City Council for approval. [Alejandra Lopez, Assistant City Manager; Michael Ramsey, Executive Director, Workforce Development Office]

   Councilmember Galvan moved for item to be moved to the September 16, 2026 B Session. Councilmember Castillo seconded the motion. The motion carried by the

following vote:

Aye: Viagran, Castillo, Galvan, Meza Gonzalez
Absent: Spears

3. Recommend Growth State Grant Program applicants to the full City Council for award. [Alejandra Lopez, Assistant City Manager; Brenda Hicks-Sorensen, Director, Economic Development]

Councilmember Galvan moved for item to be moved to the September 16, 2026 B Session. Councilmember Castillo seconded the motion. The motion carried by the following vote

Aye: Viagran, Castillo, Galvan, Meza Gonzalez
Absent: Spears

Briefing and Possible Action on the following items

2. Briefing on the Economic Development Strategic Framework [Alejandra Lopez, Assistant City Manager; Brenda Hicks-Sorensen, Director, Economic Development]

John Karras, Vice President of Business Development at TIP Strategies provided a presentation on the economic development strategic framework.

DISCUSSION:

Chair Viagran emphasized that recent memos and ongoing budget conversation made the framework discussion particularly important. She mentioned that departments would bring significant requests in mid-September due to shifting expectations about available opportunities.

Chair Viagran stated that Tax Increment Reinvestment Zone (TIRZ) remained an important incentive and asked members to engage with its economic impact. She noted that scholarship programs tied to San Antonio Education Partners should also be reviewed before September 2026.

Chair Viagran expressed appreciation for this year's improvements and requested further analysis on Goal 2: Placemaking and Real Estate, including benefits from development projects connected to public utility infrastructure and broadband expansion, particularly in older areas needing pipe connections. She requested a deeper examination of opportunity zones and TIRZ growth potential.

Chair Viagran commented that the framework should address benefits connected to housing, childcare, health, and early education initiatives underway in school districts such as Harlandale and South San.

Resources slide, including collaboration opportunities with Greater SATX. Karras responded that regional collaboration are essential and should be strengthened. Councilmember Castillo asked for clarification on external partners, Karras listed Chambers of Commerce, Sage, Prosper West, Launch SA, Geekdom, and Velocity.

Councilmember Castillo asked how recommendations could align with strategic housing plan updates and whether future committee briefings could reflect dollars tied to implementation. Economic Development Department Director Brenda Hicks-Sorensen responded that semiannual updates historically did not include dollar amounts but could be revised, and that dashboard 3.0 may help track budget-linked progress. Councilmember Castillo emphasized the need for tools like facade improvement grants and stated that linking investments to strategic plan metrics would strengthen City Council support for placemaking place-making efforts.

Chair Viagran noted the importance of understanding global engagement under Goal 1: 1.1 Incentives and asked staff to help identify global parent companies behind local subsidiaries to better inform international missions and partnerships. She stated that this would help the committee understand economic relationships with companies in regions visited by delegations. Chair Viagran emphasized that Greater SATX held relevant information needed for the September 9, 2026 deliverable.

Councilmember Galvan requested that accessing financing include residential and commercial access to credit and capital. He noted that prior studies showed barriers affecting economic mobility and asked for integration of such findings. Councilmember Galvan requested stronger data connections to program metrics and suggested exploring community benefits agreements with major employers to support educational pathways and workforce pipelines.

Councilmember Meza González asked whether the map of existing energy and innovation districts existed. Karras explained that the City's Smart Cities innovation areas did not fully align with traditional economic development innovation districts but that overlaps would be evaluated. Councilmember Meza González asked if expanded small businesses procurement opportunities, such as Supply SA, represented new priorities. Hicks-Sorensen confirmed it was a newly framed category and aligns with the framework. Councilmember Meza González asked about differences between Ready to Work and broader workforce training programs. Karras explained that Ready to Work was being examined in greater depth, while other workforce investments will align with the talent ecosystem.

The item was for briefing purposes only.

3. Update to the Council Consideration Request by Councilmember Marina Alderete Gavito (District 7) on the Reporting of City Funds Going to Local Businesses. [Ben Gorzell, Chief of Financial & Administrative Services; Troy Elliott, Chief Financial Officer, Finance]

Councilmember Alderete Gavito submitted a letter in support of Council Consideration

Regarding Goal 3: Talent and Workforce, Chair Viagran emphasized the importance of workforce wraparound supports and referenced onsite healthcare models used by employers like Toyota.

Chair Viagran raised concerns about business retention and headquarters expansion, noting some companies had opened satellite offices outside the City. She emphasized the importance of aviation and transportation access remained key factors and referenced a recent Aviation Department presentation. She stated that she expected additional discussion before September 9, 2026.

Councilmember Galvan expressed interest in Goal 2: Placemaking and Real Estate and asked for examples of enhancements from previous framework, noting the structure appeared similar. Karras responded that regional centers, community areas, and corridors remained core elements, the City's role in infrastructure, amenities, planning coordination and tools such as land acquisition and partnerships were now more clearly defined.

Councilmember Galvan asked whether recommendations would distinguish between strong market areas and areas with limited historic investment. Karras confirmed that strategies would be tailored based on market viability.

Councilmember Galvan asked whether Goal 3: Talent and Workforce included support for K-12 fundamentals. Karras stated that K-12 alignment could be incorporated under higher education partnerships, Artificial Intelligence adoption efforts, and wraparound supports.

Councilmember Castillo supported the report's focus on residents with varied educational backgrounds and trades but asked whether Artificial Intelligence adoption recommendations could conflict with workforce training programs by eliminating job positions. She asked for stronger emphasis on infrastructure investment as an economic attractor.

Councilmember Meza González asked for more actionable items in future report iterations. She asked whether near-term infrastructure options existed aside from long-term TIRZ or bond-funded projects. Karras stated that site prioritization work in Goal 2: 2.2 Business Site Development (New) already identified business park areas that could be made viable with infrastructure investment and that the approach could be scaled citywide.

Councilmember Meza González asked how districts could be evaluated for readiness and requested clarification on short and long-term metrics. Karras responded that job creation, retention, company growth, and investment attraction were key measures. Councilmember Meza González requested explicit inclusion of those metrics, noted the alignment needed with Medical Center placemaking priorities, and asked that the medical alliance report be integrated.

Councilmember Castillo asked about enhanced partnerships on the Updated Capacity and

preference program required additional criteria such as minimum time in operation and employee requirements. Councilmember Meza Gonzalez asked how this work aligned with Supply SA, specifically whether outreach and reporting efforts would eventually merge. Elliott explained that work was underway with the small business office and Supply SA, and he noted that full alignment was an eventual goal once systems and data capabilities matured. Councilmember Meza Gonzalez confirmed that alignment was a long-term target.

Chair Viagran noted that multiple options for defining local were needed and directed staff to develop those options and return them, even via memo, so the Economic Workforce Development Committee (EWDC) committee could consider agendizing the item before sending it to full Council.

The item was for briefing purposes only.

4. Update on City's Contract and Procurement Practices Related to the Resolution Supporting Evaluation of Strategies to Protect all San Antonians [Ben Gorzell Jr., Chief of Financial and Administrative Services; Troy Elliott, Chief Financial Officer, Finance]

Troy Elliot, Chief Financial Offer, provided a presentation on the City's Contract and Procurement practices related to the resolution supporting evaluation of strategies to protect all San Antonians.

DISSCUSION

Chair Viagran began the discussion by questioning whether voluntary or non-voluntary disclosure on bidder forms would be reliable and noted that the City needed to review both forms and include the questions regardless of whether bidders chose to answer. She mentioned that the City could still proceed through internal processes and that City Council would ultimately determine whether to recommend a low bidder. Chair Viagran noted that some contracts might need to avoid awarding to low bidders if required questions were unanswered or if concerning information emerged, referencing her experience on the Audit Committee and emphasizing that contracting practices needed to support public safety. She mentioned that bidders doing business with entities contributing to crime or mistreatment posed safety concerns for San Antonio.

Chair Viagran suggested continuing discussions with City Council and requested that staff return with proposed contract-procedure questions, either to the EWDC or to a B Session, acknowledging the City could not require responses.

Councilmember Castillo mentioned that EWDC was responsible for stewarding public dollars and recommended ensuring funding went to businesses not causing harm to communities. she asked whether bidders failing to submit disclosures, statutory or non-statutory, could be deemed non-responsive. Elliott responded that non-statutory bidders could be deemed non-responsive and excluded from City Council consideration, but statutory bidders had to be brought forward under State requirements.

Request 2026-0008 read into the record by Chief of Staff La-Tieka Sims.

Victoria Roeder, Deputy Finance Director, provided an presentation on the Reporting of City Funds Going to Local Business Council Consideration Request 2026-0008.

DISCUSSION

Chair Viagran acknowledged Councilmember Alderete Gavito's Council Consideration Request (CCR) and emphasized the need to clearly define "local", suggesting both a San Antonio specific definition and a broader metro-local definition that includes Bexar County and surrounding communities that participate in the City's economy. She explained that some vendors headquartered in surrounding areas regularly spent money in San Antonio and recommended establishing two definitions—local A and local B—before releasing any information publicly.

Chair Viagran noted that she did not support a public dashboard and instead recommended annual procurement reporting, with an additional mid-year update showing spending and projected local expenditures. She asked staff whether oversight assistance from the committee was needed for next steps before the item moved to full Council, and staff responded that no additional assistance was needed. Chair Viagran recommended that staff develop clear definitions, provide a list or one-page update summarizing the definitions and methodology, and share it with members who signed onto the CCR.

Councilmember Castillo mentioned support for the initiative and raised questions about defining "local", suggesting coordination with Small Business Economic Development Advocacy (SBEDA) to ensure consistent tracking of local contractors. She referenced past procurement situations where nonprofit organizations had local operations but mailing addresses in other cities, and she recommended relying on the SBEDA infrastructure to distinguish between national corporations with remittance addresses in San Antonio and true local vendors. Councilmember Castillo encouraged aligning tracking methods with existing SBEDA practices.

Councilmember Galvan agreed with colleagues and highlighted concerns about defining "local" too broadly. He suggested that the intention of the CCR should focus on small, locally owned businesses rather than large national entities with significant resources. Councilmember Galvan asked how the definition could ensure support for businesses historically excluded from City procurement. He noted support for accessible open data and requested more detail on how reporting could be centralized so residents, businesses, and Councilmembers could easily review line-item expenditures in one location without navigating multiple departments.

Councilmember Meza Gonzalez mentioned agreement with colleagues and referenced the local definition slide, asking for alignment between the proposed definition and the City's existing local preference program. She questioned whether remittance-to addresses and "local" were truly equivalent. Elliot responded that the intent was to classify any vendor with a remittance address inside San Antonio City limits as local, though the local

Councilmember Castillo asked whether disclosure tracking would be available and whether such applicants would be reviewed by Audit Committee. Elliott responded that information would be provided through City Council briefing memos for both statutory and non-statutory awards and for City Manager delegation items. Councilmember Castillo noted that where City Council had authority, deeming bidders non-responsive should be considered and asked clarifying questions about determining responsiveness and award decisions. She acknowledged examples shared by Elliott and referenced other U.S. initiatives.

Councilmember Galvan mentioned support for colleagues' feedback and emphasized transparency around procurement forms and disclosures. He suggested publicly showcasing which vendors signed or did not sign disclosure forms as part of accessible procurement information. Councilmember Galvan asked whether contract renewals or amendments fell under the same statutory disclosure requirements. Elliott responded that all renewals and amendments, statutory or non-statutory, would require updated disclosures before moving forward. Councilmember Galvan noted that state-level reviews of contracts based on community values mirrored the City's direction and reiterated the importance of transparency for residents reviewing how City resources were used.

Councilmember Meza Gonzalez asked whether disclosures applied to subcontractors and how far the City should extend requirements. Elliott responded that City Council could choose to include subcontractors and require prime contractors to disclose their relationships as well as require subcontractors to complete disclosures. Councilmember Meza Gonzalez asked whether subcontractors doing business with Immigration and Customs Enforcement would be treated the same as prime contractors, and Elliott confirmed that they would.

Councilmember Meza Gonzalez asked how far the City should explore disclosure depth. Elliott responded that full disclosure from prime to subcontractor would support City Council goal of understanding contract relationships. She asked whether non-awards to low bidders triggered re-solicitation rather than awarding to the second lowest bidder. Elliott confirmed that statutory procurement required award to the lowest responsible bidder and that non-award would lead to reissuance.

Councilmember Meza Gonzalez asked for clarification on the disclosure form slide, specifically the point that completing the disclosure does not affect a bidder's responsiveness but may influence award decisions. Elliott explained that responsiveness under statute remained limited to meeting specifications and price, and disclosures could not be used to determine responsiveness. Councilmember Meza Gonzalez asked whether the City Attorney concurred, and Elliott confirmed the legal review. She asked whether the item would move to a B Session and Elliott responded that based on EWDC feedback, staff would prepare more detailed requirements and possibly explore a policy at the B Session. Councilmember Meza asked whether all types of contracts would be included, and Elliott confirmed all procurement contracts would require disclosures.

Chair Viagran mentioned timeline concerning identity of low bidders who refused to disclose and noted that clear expectations around disclosure were needed. She suggested that this work supported efforts related to defining local vendors and promoting local business growth. Chair Viagran noted industries such as janitorial, security, and food services as examples where expanded local participation could reduce reliance on vendors also serving federal detention operations. Chair Viagran commented that contracting with vendors providing goods to detention centers raised significant concerns and that disclosure questions were necessary. Chair Viagran concluded by indicating she looked forward to the next steps.

The item was for briefing purposes only.

5. Update to the Procurement Process Review [Ben Gorzell, Chief of Financial and Administrative Services; Troy Elliott, Chief Financial Officer, Finance]

Victoria Roeder, Deputy Finance Director, provided a presentation on the procurement process review.

DISCUSSION

Councilmember Meza Gonzalez asked for the total project cost and funding source for the SAP upgrade. Roeder stated that the approximate cost was $70 million and CFO Troy Elliott added that funding came through debt management plans and had been included in multiple adopted budgets, including 2027. Councilmember Meza Gonzalez asked whether vendor registrations would migrate automatically and Elliott responded that data would be cleaned and migrated, with additional opportunities to add missing vendor data.

Councilmember Castillo asked whether the EWDC could receive a breakdown of selected vendors, suppliers, and advocacy groups. Roeder responded that a handout containing the list had been provided but was not included in the agenda memo. Councilmember Castillo asked whether Small Business Advisory Commission could be added to the stakeholder list, and Roeder confirmed that they could.

Councilmember Galvan requested an update on the San Antonio Trades Advisory Board. Chair Viagran explained that a subcommittee needed to be convened and noted that Councilmember Castillo and representatives such as International Brotherhood of Electrical Workers (IBEW) were part of forming that group.

Councilmember Galvan commented that forming the board quickly would support review of initiatives like procurement modernization. He noted that procurement transparency was important and commented that the tabulation awards page required improvements to allow easier review of spending totals and contract durations. Councilmember Galvan suggested that consolidated procurement information would help City Council and the public understand expenses and outcomes.

Chair Viagran noted that SAP upgrades were needed to resolve audit findings and

expressed support for continued stakeholder communication and upcoming briefings.

The item was for briefing purposes only.

Executive Session

Chair Viagran announced that the EWDC would enter into an executive session at 12:21 p.m.

Chair Viagran reconvened the meeting at 12:32 p.m. and stated that no official action was taken.

ADJOURNMENT

There being no further business, the meeting was adjourned at 12:32 p.m.

APPROVED

Phyllis Viagran, Chair

Debbie Racca-Sittre, City Clerk

Workforce Solutions Alamo Budget

Economic and Workforce Development Committee
Item 2

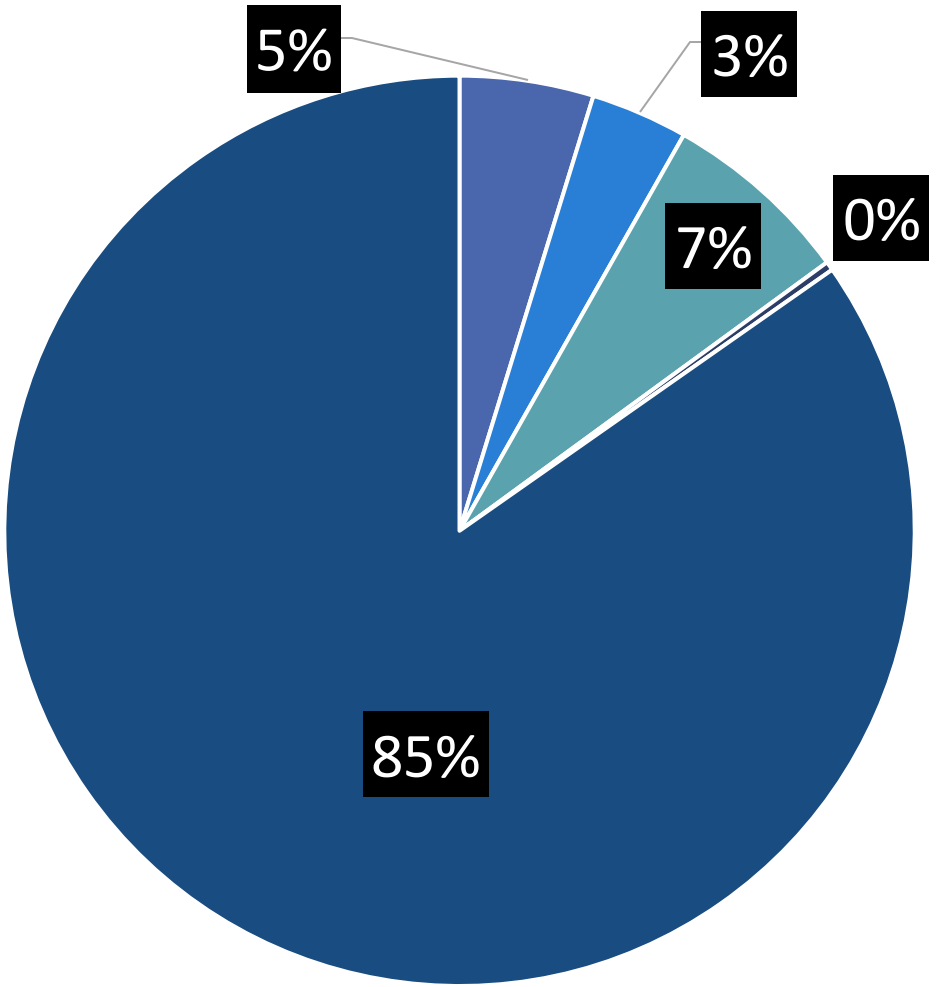
August 31, 2026

Background
Workforce Solutions Alamo

- **Governing Board for the regional workforce system**
- **Represents taxpayers of the 13-county Alamo region**
  - Atascosa, Bandera, **Bexar**, Comal, Frio, Gillespie, Guadalupe, Karnes, Kendall, Kerr, McMullen, Medina and Wilson
- **27 Board members**
  - Oversee implementation of state and federal workforce programs
  - Reflect business, economic development, education, labor, community organizations, and government
- **Elected officials from WSA service area are parties to an Interlocal and Partnership Agreement**
  - Agreements create the "**Committee of Six**" which performs the duties of elected officials
  - Agreements require City Council approval of the annual operating budget



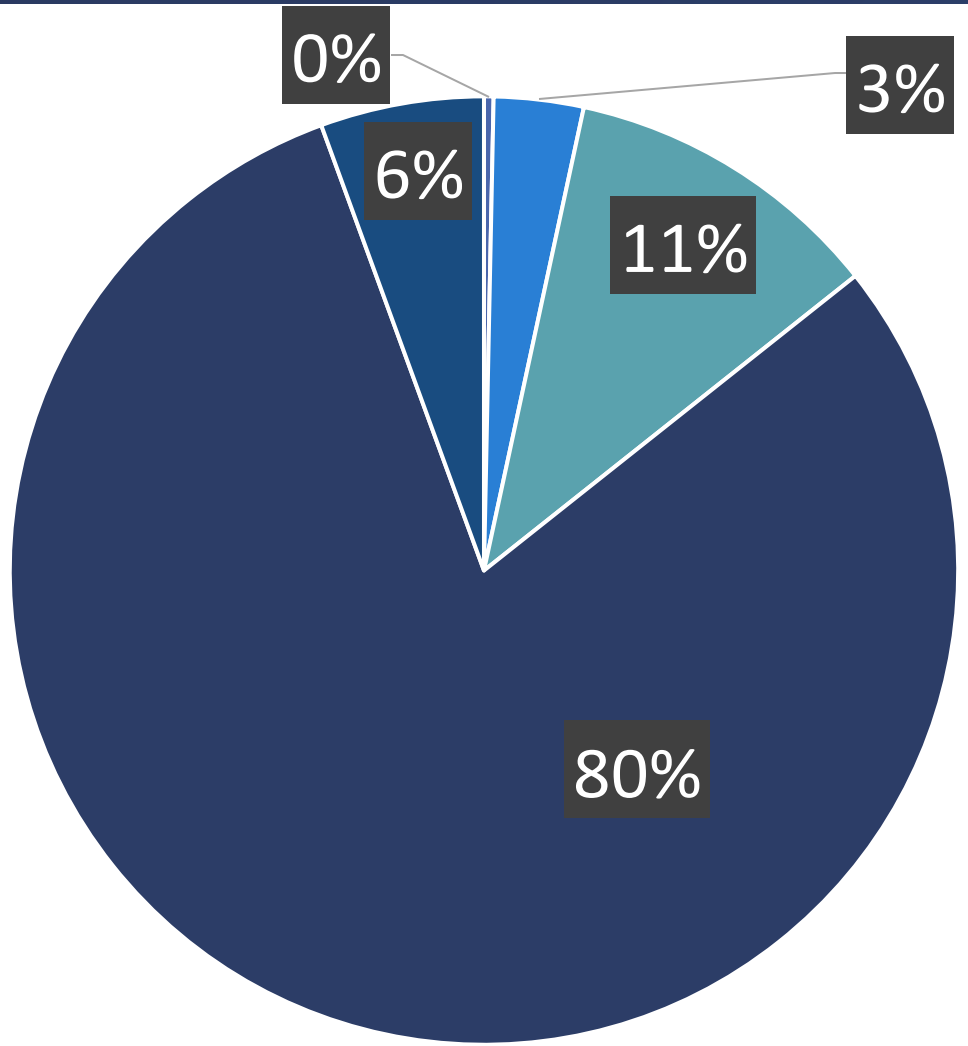
FY27 Operating Budget ($195M)



- Corporate $9,287,935
- Facilities $6,743,999
- Reserves $13,192,119
- Initiatives $616,481
- Service Delivery $165,540,236

Service Delivery Budget ($165M)





- DOL $537,669
- Ready to Work $5,061,040
- TWC $18,116,217
- Child Care Subsidy $132,594,726
- Child Care Quality $9,230,584

FY27 Budget Summary

FY 26 Budget Comparison							
Budget Category	**FY25 Budget**	**FY25 Projected Expenditures**	**Projected Exp. (%)**	**FY26 Proposed Budget**	**Increase / Decrease ($)**	**Increase / Decrease (%)**	**Percent of Budget**
Board Administration and Corporate Total	$9,716,494	$7,924,693	81.6%	$8,716,376	($1,000,118)	-10.3%	3.8%
Facilities & Service Delivery Total	$201,423,883	$201,632,738	100.1%	$183,589,004	($17,834,879)	-8.9%	96.2%
Total Budget	***$211,140,377***	***$209,557,432***	***99.3%***	***$192,305,381***	***($18,834,997)***	***-8.9%***	***100%***

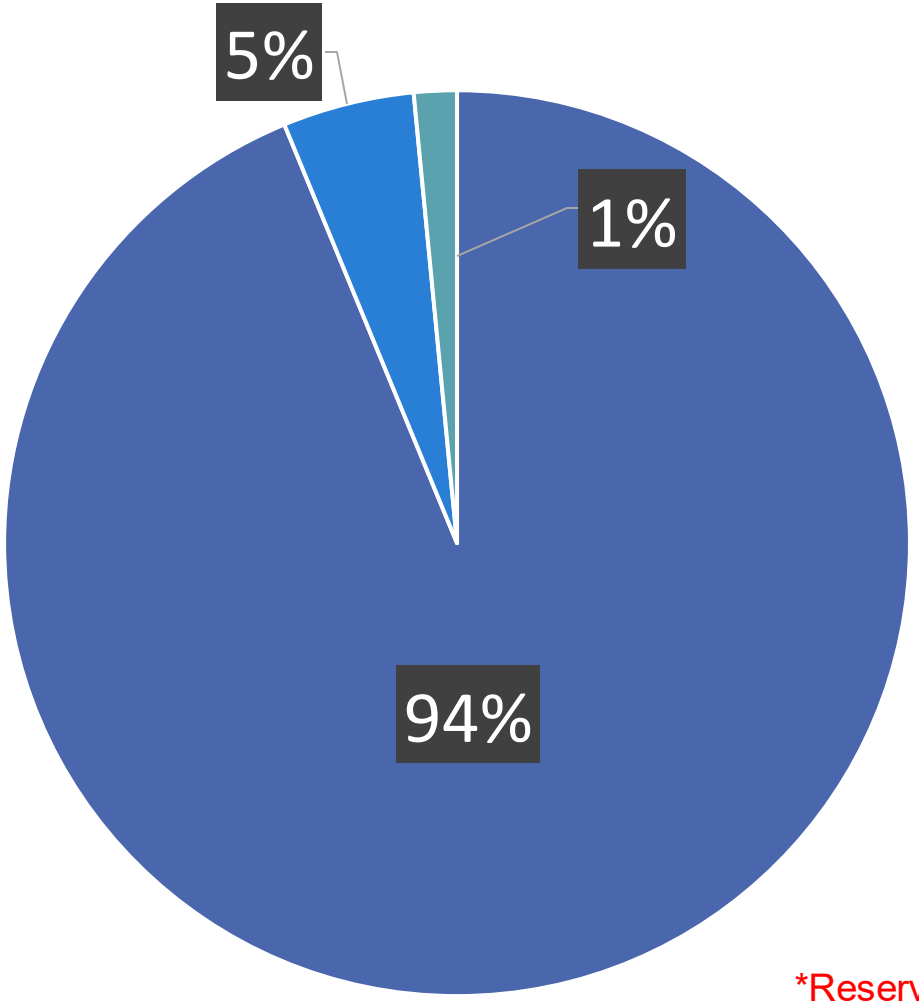
*Corporate costs are projected to **decrease by $124,364 (1.4%)**, excluding Board Office relocation expenses. If the relocation proceeds, the overall corporate budget would **increase by $507,136 (5.8%)**. Should the relocation not occur, the funds will be **reallocated to service delivery.**

Budget Categories Descriptions

Board Administration and Corporate Costs Include*: Personnel Salaries / Wages, Fringe Benefits, Staff Travel and Staff Development, Corporate Facilities, Equipment Related, General Offices, Professional Services, Board of Directors*

Facilities & Service Delivery: Facilities, Reserve, Initiatives, Service Delivery – DOL, TWC, and RTW

FY27 Reserve ($13M)

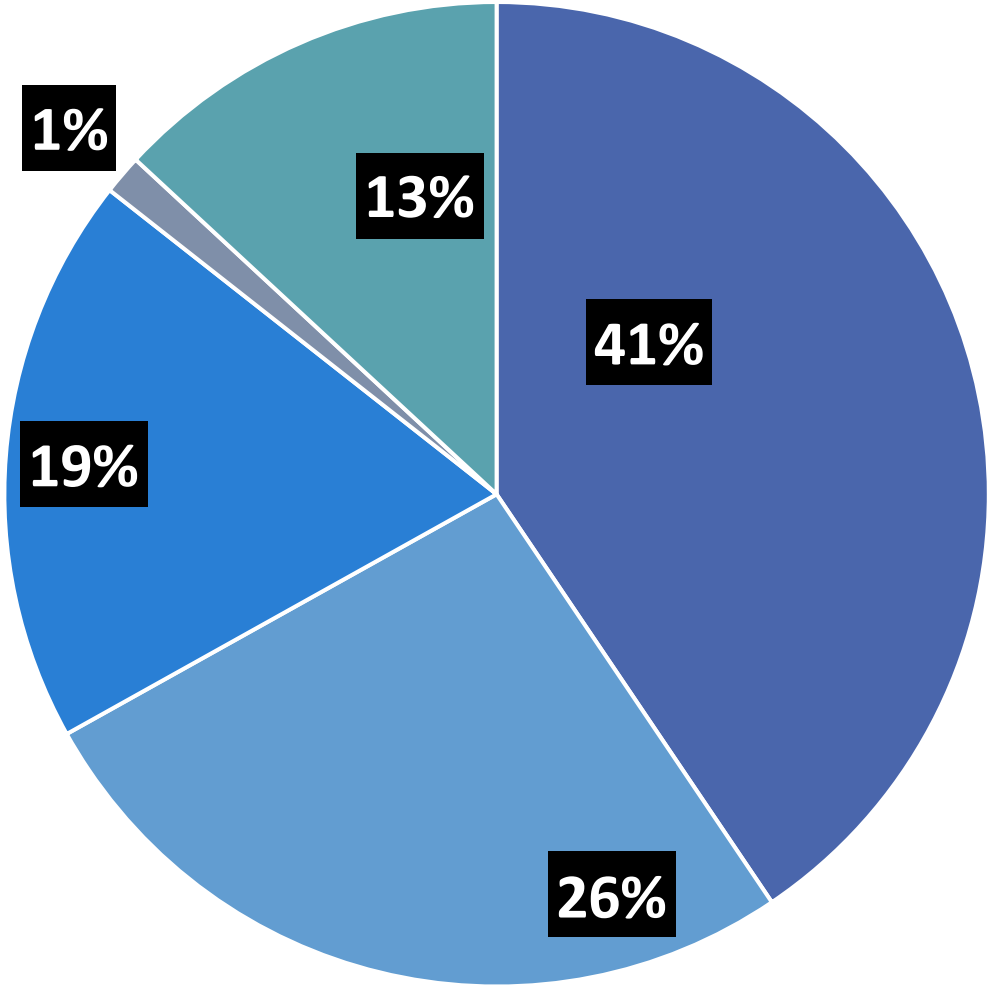


- Child Care Subsidy Reserve $12,370,665
- Child Case Quality Reserve $619,773
- Carryover $201,681



*Reserves remain available to address unexpected contingencies and multi-year funding obligations.

Initiatives ($616K)



- Summer Earn & Learn $250,000
- Teacher Externship $162,443
- Adam Scripps Foundation $115,266
- Kronkowsky Foundation $8,000
- Work Commission Initiatives $80,772



Staff Recommendation

- Approve Workforce Solution Alamo's FY 26-27 Fiscal Year Budget in the amount of $195,380,770.

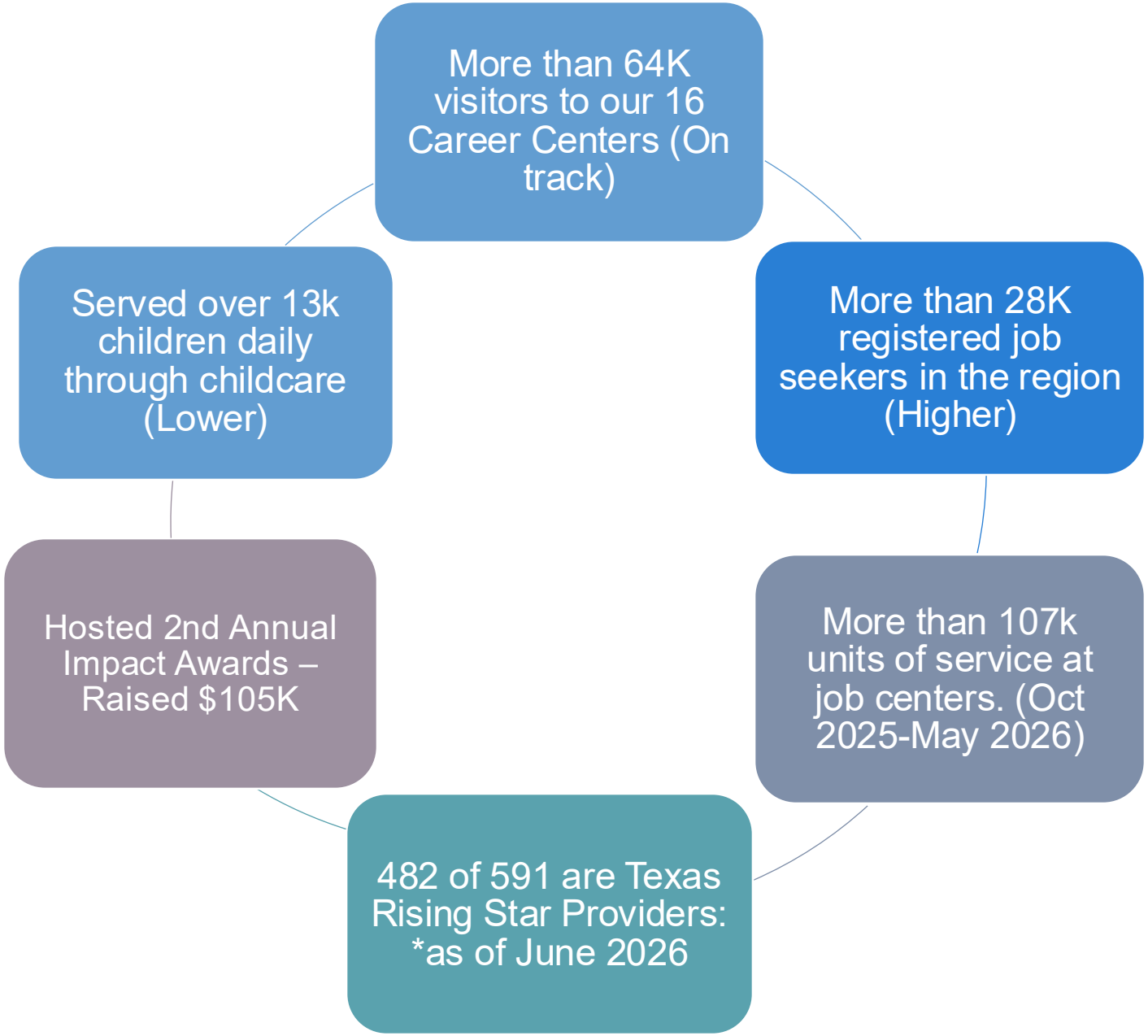
Workforce Solutions Alamo Budget

Economic and Workforce Development Committee
Item 2

August 31, 2025

Cumulative Program Activity

As of May 2026



Growth Stage Grants Program Update

Economic and Workforce Development Committee

Presented by:
Rebecca Acuña, Business Advancement Manager
Economic Development Department
August 31, 2026

Why Growth Stage Grants?



FY 2026 Program Budget

Economic Development Incentive Fund (EDIF)

Total Growth Stage Budget: $1,000,000

SBIR/STTR Grants	Second Stage Company Grants
$500,000 Stage I: up to $50,000 Stage II: up to $100,000	$500,000 up to $100,000

Marketing & Outreach



20

Applications Completed & Submitted

April – May 2026

- Cross-promotion with business development organizations and partners, including gSATX, BiomedSA, VelocityTX, San Antonio Greater Chamber of Commerce.
- Direct outreach to target industry companies
- Two info sessions
- Two technical assistance session

Recommended Grantees

Company Name	Grant Type	Amount	Total
Novothelium	SBIR/STTR – Phase 1	$50,000	$299,648.44
Phage	SBIR/STTR – Phase 1	$49,648.44	
Sygnamap	SBIR/STTR – Phase 2	$100,000	
Valkim	SBIR/STTR – Phase 2	$100,000	
Optimized Technical Solutions	Second Stage	$100,000	$500,000.00
iGenomeDX	Second Stage	$100,000	
Web-Hed	Second Stage	$100,000	
Tekgration	Second Stage	$100,000	
Urbanize	Second Stage	$100,000	
Total			**$799,648.44**

Next Steps

August: Economic and Workforce Development Committee Consideration

September: City Council A Session Consideration

October 2026: Contract Execution

Fiscal Impact

- Funding for the nine (9) Growth Stage Grant Agreements, totaling $799,648.44, is available from the Economic Development Incentive Fund (EDIF)

Recommendation

EWDC approval for funding of all nine (9) eligible applicants:

- Novothelium
- Phage
- Sygnamap
- Valkim
- Optimized Technical Solutions
- iGenomeDX
- Web-Hed
- Tekgration
- Urbanize

Growth Stage Grants Program Update

Economic and Workforce Development Committee

Presented by:
Rebecca Acuña, Business Advancement Manager
Economic Development Department
August 31, 2026

FY 2023 Grant Impact

- 16 of 19 grantees reported positive net revenue growth totaling $16.6M, representing a 62% increase across all reported companies.
- All respondents from March 2026 survey described direct positive impacts, e.g. new hires, new contracts, expanded capabilities

- Grant structural improvements for FY26
  - Increased marketing and support sessions
  - Re-structured milestone-based payments
  - Streamlined reporting requirements

"The grant fundamentally shifted our day-to-day operations, acting as a vital "steroid shot", providing the immediate momentum needed to scale [our business]."

- Laredo Technical
FY23 Second Stage Grantee

Second Stage Company Eligibility Criteria



- For-profit, privately-owned business headquartered in San Antonio city limits;
- $1–$50m in annual revenue;
- Demonstrate growth in employment or revenue in 2 of the past 5 years;
- 100 or less employees;
- Pay all FTE at least $20/hour;
- Must participate in workers' compensation and provide a healthcare benefits package to all full-time employees
- Operates within a COSA Strategic Industry, verified via NAICS code
    1. Mobility
    2. Corporate Services
    3. Bioscience Anchors & Catalysts
    4. IT Security & Infrastructure
    5. Sustainable Energy

SBIR/STTR Company Eligibility Criteria



- Headquartered in San Antonio
- 40 or less employees
- For-profit, privately-owned business

Phase I:

- SBIR/STTR Phase I award in the past two years
- No prior COSA SBIR/STTR Phase I funding

Phase II:

- SBIR/STTR Phase II award in the past two years
- No prior COSA SBIR/STTR Phase II funding (except Phase I award as underlying project)
- Conduct 51%+ project activities in COSA

Evaluation Criteria

Eligibility criteria verification

Second Stage Companies

- Operational need– business gaps to address
- Quality of Business Growth Plan – clarity, feasibility, alignment of milestones with disbursement structure
- Use of funds – reasonable & justifiable
- Job creation – strength and credibility of creation and retention commitments
- Financial stability – revenue history, growth projections

SBIR/STTR Companies

- Technological merit – innovation, description, problem-solution fit
- Quality of Commercialization Plan – milestones feasibility, market readiness, disbursement alignment
- Use of funds – reasonable & justifiable
- Team capability – experience and capacity of key personnel

SBIR/STTR Grant Recommendations - Phase I

Company	Company Background	Growth Project Summary	Council District
PHAGE REFINERY	Develop virus-fighting phages (good viruses that combat bad bacteria) up to 100 times faster than standard procedures & extending shelf life from days to years.	Refining pipeline of MRSA bacteria (causes staph infections), to create more effective treatments for patients.	8
NOVOTHELIUM REIMAGINING BREAST RECONSTRUCTION	Biotechnology company to create the first human tissue graft, allowing mastectomy patients to naturally regrow their own nipple tissue.	Prepare for commercial growth by funding technical writing and marketing updates, paying patent maintenance fees, and purchasing small equipment to improve operational efficiency.	10

SBIR/STTR Grant Recommendations - Phase II

Company	Company Background	Growth Project Summary	Council District
SYGNAMAP SPATIAL OMICS FOR SIGNATURES OF CURE	Advanced medical imaging and molecular data to find specific disease markers, helping doctors choose the most effective, personalized treatments.	Expanding on Phase I, develop therapeutics using AI for chronic conditions such as diabetic kidney disease, advance patent applications, & pre-clinical testing.	7
VALKIM TECHNOLOGIES	Building specialized robots to inspect hazardous areas and storage tanks, keeping humans out of dangerous conditions across industrial, energy, and defense sectors.	Expand facilities at Port San Antonio, procure manufacturing and testing equipment, hire technical staff, and expand marketing and business development efforts.	5

Second Stage Grant Recommendations

Company	Company Background	Growth Project Summary	Council District
Optimized Technical Solutions Innovating Technology	Delivering affordable, high-quality IT services to government clients.	Execute a five-part growth strategy encompassing new staff hiring, CMMC compliance certification, hardware upgrades, conference sponsorships, and technical workforce training.	1
Tekgration	Veteran-owned technology provider that helps Texas government and education clients securely modernize their IT systems and software.	Expand AI governance and security practice - hire an expert advisor, launch new marketing initiatives, secure professional legal and accounting services, and acquire demonstration tools to better serve its clients.	1

Second Stage Grant Recommendations

Company	Company Background	Growth Project Summary	Council District
URBANIZE	Helps affordable housing developers make faster, lower-risk decisions across the country by using data and technology to find the best project sites.	Hire 1 front-end engineer and 1 business development associate, procure high-performance computer hardware to scale DealMap platform.	7
iGENOMEDX	Certified laboratory that provides high-quality diagnostic and testing services to Texas healthcare providers.	Bring blood testing in-house to reduce outsourcing costs and increase local capabilities.	8

Second Stage Grant Program Recommendations

Company	Company Background	Growth Project Summary	Council District
webhead	Technology company that provides software engineering and cybersecurity services to government and healthcare clients.	Upgrade AI and cyber infrastructure, train its staff to win and execute larger, more complex federal and defense contracts.	1

AUGUST 31, 2026

ECONOMIC DEVELOPMENT STRATEGIC FRAMEWORK UPDATE

ECONOMIC DEVELOPMENT AND WORKFORCE COMMITTEE



- TOM STELLMAN, CEO & FOUNDER
- JOHN KARRAS, VICE PRESIDENT
- ALEXIS ANGELO, CONSULTANT

TIP STRATEGIES

50+
Member Advisory Committee

20+
Roundtables

180+
Small Business Survey Responses

25+
Interviews

WHAT WE HAVE LEARNED

1. San Antonio is building momentum with **major catalyst investments** making downtown, placemaking, and quality of life priorities for San Antonio's economic competitiveness.
2. The region's strongest differentiators are defense innovation, cybersecurity, healthcare, bioscience, and advanced manufacturing, but there are opportunities to capitalize on **emerging sectors**.
3. Talent retention and **workforce development** to support quality and accessible jobs are among the region's most important long-term challenges.
4. Infrastructure is key to developing **competitive sites** for new and expanding business.
5. Small business and entrepreneurship stakeholders want stronger pathways to procurement, capital, and scale.
6. San Antonio needs to be better at **sharing its story**.
7. Many stakeholders believe San Antonio has the ingredients of a nationally **competitive innovation economy** but has not yet fully translated its assets into economic outcomes.
8. There is broad concern about **balancing growth, affordability, and inclusive opportunity**.
9. Stakeholders consistently called for greater focus, accountability, and implementation discipline.
10. San Antonio must leverage its strong links to Latin America, Asia, and beyond.

FRAMING TODAY'S DISCUSSION

What does it mean for San Antonio to **level up**?

- **Increasing competitiveness** with national and global peers
- Creating new **opportunities for employment** at all levels
- **Expanding the wealth, assets, and tax base** of our residents and businesses

Questions to consider:

- Which strategies are the **top priority**?
- What other opportunities are there for **transformative projects**?

GOALS AND UPDATED GOAL STATEMENTS



GOAL 1
Innovation and Industry

Strengthen San Antonio's position as a globally competitive destination for business investment and innovation.



GOAL 2
Placemaking and Real Estate

Invest in amenities and infrastructure to stimulate private sector investment in place-based redevelopment areas and employment districts.



GOAL 3
Talent and Workforce

Improve economic mobility for San Antonians through developing a workforce with the skills to access good jobs.



Capacity and Resources

Refine the City's economic development tools, align partners, and pursue new funding options to activate the updated framework.

2022 GOAL 1. INNOVATION & INDUSTRY

Retain, expand, and attract businesses within each strategic industry cluster, provide more effective small business support, and facilitate innovation-centric entrepreneurship.

1.1. BUSINESS DEVELOPMENT

- 1.1.1. Business Retention & Expansion
- 1.1.2. Business Attraction
- 1.1.3. Business Intelligence
- 1.1.4. Marketing
- 1.1.5. Foreign Direct Investment

1.2. SMALL BUSINESS

- 1.2.1. SBEDA
- 1.2.2. Business Development Organizations
- 1.2.3. Financing
- 1.2.4. Buy Local

1.3. ENTREPRENEURSHIP

- 1.3.1. Capital
- 1.3.2. Entrepreneurial Support Organizations
- 1.3.3. Reverse Pitch Competition
- 1.3.4. Youth Entrepreneurship
- 1.3.5. R&D and Commercialization

UPDATED GOAL 1. INNOVATION & INDUSTRY

Strengthen San Antonio's position as a globally competitive destination for business investment and innovation.

1.1. BUSINESS DEVELOPMENT ENHANCED

- 1.1.1. San Antonio Story NEW
- 1.1.2. Business Retention and Expansion ENHANCED
- 1.1.3. Business Attraction ENHANCED
- 1.1.4. Global Engagement ENHANCED
- 1.1.5. Business Intelligence ENHANCED

1.2. INNOVATION NEW

- 1.2.1. Ecosystem Density and Connectivity NEW
- 1.2.2. Venture and Angel Investment Capital NEW
- 1.2.3. Existing and Emerging Innovation Districts NEW
- 1.2.4. Entrepreneurship ENHANCED
- 1.2.5. R&D and Commercialization ENHANCED

1.3. SMALL BUSINESS ENHANCED

- 1.3.1. Expanded Opportunities for Procurement NEW
- 1.3.2. Business Strategy and Development NEW
- 1.3.3. Financing ENHANCED
- 1.3.4. Buy Local ENHANCED

2022 GOAL 2. PLACEMAKING & REAL ESTATE

Accelerate place-based real estate development projects that create quality spaces for new jobs and investment in San Antonio's regional centers and neighborhood economic nodes.

2.1. PLACE-BASED DEVELOPMENT

- 2.1.1. Regional Centers
- 2.1.2. Community Areas
- 2.1.3. Corridors
- 2.1.4. Land Banking
- 2.1.5. Innovative Financing

2.2. CULTURE & AMENITIES

- 2.2.1. Community Heritage
- 2.2.2. Arts and Culture
- 2.2.3. Outdoor Amenities
- 2.2.4. Tourism

2.3. INFRASTRUCTURE

- 2.3.1. Airport
- 2.3.2. Transportation
- 2.3.3. Utilities
- 2.3.4. Resilient Systems

UPDATED GOAL 2. PLACEMAKING & REAL ESTATE

Invest in amenities and infrastructure to stimulate private sector investment in place-based redevelopment areas and employment districts.

2.1. PLACE-BASED INVESTMENT AND REDEVELOPMENT ENHANCED

- 2.1.1. Regional Centers ENHANCED
- 2.1.2. Community Areas ENHANCED
- 2.1.3. Corridors ENHANCED

2.2. BUSINESS SITE DEVELOPMENT NEW

- 2.2.1. Site Prioritization & Investment NEW
- 2.2.2. Utilities ENHANCED
- 2.2.3. Transportation Infrastructure ENHANCED

2.3. TOURISM AND CULTURE ENHANCED

- 2.3.1. Community Heritage ENHANCED
- 2.3.2. Arts and Culture ENHANCED
- 2.3.3. Tourism ENHANCED

2022 GOAL 3. TALENT & WORKFORCE

Ensure San Antonio residents have accessible pathways to well-paying jobs and employers have access to a robust pipeline of talent.

3.1. WORKFORCE DEVELOPMENT

- 3.1.1. Ready to Work
- 3.1.2. Training
- 3.1.3. Higher Education
- 3.1.4. Underserved Populations

3.2. TALENT RETENTION & ATTRACTION

- 3.2.1. Young Professionals
- 3.2.2. Military Personnel
- 3.2.3. Remote & Hybrid Workers
- 3.2.4. Targeted Talent Attraction

3.3. WRAPAROUND SUPPORT

- 3.3.1. Housing
- 3.3.2. Transit
- 3.3.3. Broadband
- 3.3.4. Child Care
- 3.3.5. Health

UPDATED GOAL 3. TALENT & WORKFORCE

Improve economic mobility for San Antonians through developing a workforce with the skills to access good jobs.

3.1. READY TO WORK 2.0 NEW

- 3.1.1. Sustainable Funding Model and Program NEW
- 3.1.2. Prioritize Demand Occupations NEW
- 3.1.3 Target Populations NEW

3.2. TALENT ECOSYSTEM NEW

- 3.2.1. Higher Education ENHANCED
- 3.2.2. Sector Partnership Implementation NEW
- 3.2.3. AI Adoption NEW
- 3.2.4. Talent Intelligence Center NEW

3.3. TALENT RETENTION AND ATTRACTION ENHANCED

- 3.3.1. Military Personnel ENHANCED
- 3.3.2. Targeted Talent Attraction ENHANCED
- 3.3.3. Wraparound Supports ENHANCED

2022 GOAL 4. CAPACITY & RESOURCES

Align the City's economic development tools around strategic growth and coordinate with local organizations on shared goals and actions that benefit San Antonio as a whole.

4.1. TOOLS

- 4.1.1. SAEDC
- 4.1.2. Incentives
- 4.1.3. TIRZ
- 4.1.4. Bonds

4.2. PARTNERSHIPS

- 4.2.1. greater:SATX
- 4.2.2. Other External Partners
- 4.2.3. Interdepartmental Collaboration

4.3. EDD STAFFING

- 4.3.1. Business Retention & Expansion
- 4.3.2. Placemaking
- 4.3.3. Research

UPDATED CAPACITY & RESOURCES

Refine the City's economic development tools, align partners, and pursue new funding options to activate the updated framework.

1. TOOLS ENHANCED

- 1.1. Incentives ENHANCED
- 1.2. Innovative Financing ENHANCED
- 1.3. Land Banking and P3 Development NEW

2. PARTNERSHIPS ENHANCED

- 2.1. greater:SATX ENHANCED
- 2.2. Other External Partners ENHANCED
- 2.3. Interdepartmental Collaboration ENHANCED

3. FUNDING OPTIONS NEW

- 3.1. Public Sector (State and Federal) NEW
- 3.2. Private Sector (Corporate and Foundation) NEW
- 3.3. Grant Writing Expertise NEW

WHAT'S NEXT?


September 9
Deliver draft updated framework to City Council
Mid September
Finalize updated framework and all deliverables
October 15
City Council Consideration



TIP STRATEGIES

www.tipstrategies.com

Reporting of City Funds Going to Local Businesses

Finance Department

Council Consideration Request

1. Create a uniform definition of “local” as it relates to this reporting purposes.
2. Establish a streamlined reporting process by which Council and the public are made aware of both the percentage and total amount of City dollars going to local businesses, including grants, prime contracts, subcontracts, and other expenditures.
3. Establish a practice by which departments report local spending data whenever they present department-specific spending to Council.
4. Present a citywide local spending report to Council, beginning with the FY26 6+6 budget presentation and continuing with each proposed budget presentation.
5. Utilize data gathered through the reporting process to identify potential gaps in local service and sectors to guide workforce development initiatives.

1. Local Definition

Request: Create a uniform definition of “local” for reporting purposes.

Recommend:
Align definition with our local program.

For reporting of vendor payments and contract awards “local” will be defined as a vendor’s remit-to address within San Antonio city limits.

2. Report City Spending to Local Businesses

Request: Report the percentage and total amount of City dollars going to local businesses, including grants, prime contracts, subcontracts, and other expenditures.

Recommend:

- Vendor payments can be reported by their remitted address to determine whether they are located within or outside the San Antonio city limits.

- For local payments we don't have the system/data and processes to report at the subcontractor level.

3. Departments Report Local Spending

Request: Departments report local spending data whenever they present department-specific spending to Council.

Recommend:
Departments report local spending data in Council briefing memos for items presented for Council consideration.

4. Report Citywide Local Spending

Request: Report citywide expenditures to local businesses.

Recommend:
Report awarded and spent based on remitted address.

1. Local Contracts Awarded

2. Local Spent Amount

FY 2025 Local Contracts Awarded & Spent

Total Procurement Awarded:	Local Awarded
$1,574,311,727	$799,419,259
Total Amount Spent:	**Local Spent**
$2,231,990,530	$905,259,286

- Local - businesses with local addresses within the San Antonio incorporated City limits

5. Identify Service & Sector Gaps

Request: Use collected data to identify service and sector gaps to inform workforce development initiatives.

Recommend:

Future SAP – COSA Connect

- Evaluate system design and configuration to capture award and spend data to report by service or sector.
  - Construction
  - Architecture and Engineering
  - Goods and Supplies
  - Professional Services
  - Non-Professional Services
- Evaluate staffing resource requirements.
- Post go live: **October 1, 2027**

Recommendations

Current reporting opportunities:

- Define local for reporting purposes:
  - Reporting for payment and contract awards
  - Utilize vendor local remit address
  - Within city limits
- Departments report local spending data in Council briefing memos for items presented for Council consideration.
- Present to Council during the annual Procurement Forecast.

Consideration for future reporting opportunities:

- Report City dollars going to subcontracts.
- Report City expenditures by service and sector industry.
- Provide meaningful insights to identify service or sector workforce gaps.

Council Consideration Request

Background

Submitted March 19, 2026, by Council District 7

Request

Develop and implement a standardized citywide reporting framework that:

- Defines the term “local”
- Reports departmental and citywide expenditures to local businesses
- Uses the resulting data to identify gaps in local services

Peer City Local Definition

City	Definition of Local
Austin	Headquarters or administrative center located within the Austin–Round Rock–San Marcos MSA.
Houston	Headquartered in Houston-Sugar Land-Baytown MSA **OR** established place of business within the MSA from which 20% or more of the entity's workforce are regularly based
Corpus Christi	Principal place of business within city limits and one or more of the entity's workforces are regularly based, and/or from which a business conducts a substantial part of its operations
Dallas	Principal place of business within city limits **OR** at least 20% or 100 of employees are Dallas residents.
El Paso	Tiered definition: principal place of business within city limits; workforce residency thresholds; facility operating locally for at least one year.
McAllen	Principal place of business located within city limits.

*Principal place of business means a business headquarters or an established place of business

UPDATE TO SUPPORTING EVALUATION OF STRATEGIES TO PROTECT ALL SAN ANTONIANS

PROCUREMENT ACTION ITEMS

Economic & Workforce Development Committee

August 31, 2026

Presented by: Troy Elliott, CPA, Chief Financial Officer, Finance Department

Overview

- **February 12, 2026** - City Council approved a resolution supporting the evaluation of strategies to protect all San Antonians
- **March 5, 2026** - Initial update provided during City Manager's Report
- **April 9, 2026** - City Manager Report recommended 5 items be forwarded to the Economic Workforce Development Committee (EWDC) for further discussion and evaluation of implementation options
- **May 26, 2026** – EWDC briefing on policy applicability to statutory and non-statutory procurements

Procurement Actions

Items impacting the City's contract and procurement practices:

Action
• Council policy to not do business with entities providing support to I.C.E.
• Non-Contracting Policies: Assess the City's legal authority to decline entering into contracts, renewals, or extensions with vendors that simultaneously contract with or provide services to I.C.E. detention facilities consistent with state and federal law and existing procurement frameworks
• Procurement Standards and Values-Based Criteria: Review whether existing procurement policies may be strengthened to include considerations related to civil rights, community impact, and ethical business practices, and whether such criteria can be applied prospectively to future contracts
• Vendor Accountability and Disclosure: Evaluate mechanisms to require disclosure of vendor participation in detention or immigration enforcement operations when contracting with the City (healthcare, food service, construction, security and facility maintenance)
• Insurance, Liability, and Risk Exposure: Evaluate how vendor participation in detention operations affects liability exposure, insurance costs, and reputational risk for both the City and its contractors, and whether additional safeguards or exclusions are warranted

Summary of Applicability

- **Non-Statutory** - City may apply vendor accountability measures, non-contracting policies, or values-based criteria only to discretionary contract types such as:

    - Professional and consulting services (not governed by statute)
    - Leases of City-owned real property
    - Concession agreements
    - Other revenue-generating contracts

- **Statutory** - State and federal laws limit the City's ability to apply these criteria to other contract categories.

EWDC's Request & Follow-up

- At the May 26, 2026, EWDC briefing, the committee requested the following:
  - Findings from outreach to peer cities on policies and practices
  - Examples of disclosure forms and other mechanisms used to support vendor transparency and contracting considerations for statutory and non-statutory procurements

Findings – Texas Cities

Texas state laws mandate local governments to cooperate and support I.C.E

- No Texas cities have procurement-specific policies restricting business with entities supporting I.C.E.

Findings – Other U.S. Cities

California Code Section § 7284 - California's Values Act - Restricts state and local law enforcement agencies from using agency resources to investigate, interrogate, detain, detect, or arrest persons for federal civil immigration enforcement purposes

- **Oakland, California -** requires signed disclosure before contract execution; requires contractors to attest they are not under contract with I.C.E., and other federal agencies for data-related services.
- **Berkeley, California -** prohibits contracts with entities doing business with I.C.E.; requires signed compliance statement; solicitations have language stating proposals without declaration cannot legally move forward unless City Council issues a waiver.
- **Las Angeles, California -** prohibits contractors use of city resources, property or data for purpose of federal immigration enforcement; letter issued to contractors and language included in solicitations.

Pennsylvania - No State Code - handled Independently by Each State Agency or Municipality

- **Philadelphia, Pennsylvania** - ordinance prohibiting contracts with entities that do business with I.C.E.; violations may result in up to a five-year contracting ban.

Disclosure Forms

- **Two Disclosure Forms would be required:**
  - **Non-Statutory** - Vendors disclose contracts with federal, state, or local government entities as part of experience and qualifications.
  - **Statutory** - City could obtain disclosure of government contracts from recommended bidder; information is reported to City Council prior to award

Disclosure Form - Statutory
(IFB, RFCSP, RFQ)

- **Statutory** - City could obtain disclosure of government contracts from recommended bidder; information is reported to City Council prior to award
- **Disclosure Form may include:**
  - Ordinance/City's policy prohibiting doing business with entities supporting I.C.E
  - Key elements
    - Vendors to disclose current contracts and affirm not doing business with I.C.E
    - Vendors to notify City of any contracts doing business with ICE during term of contract
    - Vendor's attestation and signature
    - Completion of vendor's attestation/disclosure would be optional and not required
    - Information can be requested but not be used to affect responsiveness
- **Council can elect not award to recommended responsible low bidder**

Disclosure Form - Non-Statutory

(Discretionary – RFQ/RFP)

- **Non-Statutory** - Vendors disclose contracts with federal, state, or local government entities as part of experience and qualifications.
- **Disclosure Form may include:**
  - Ordinance/City's policy prohibiting doing business with entities supporting I.C.E
  - Key elements
    - Vendors to disclose current contracts and affirm not doing business with I.C.E
    - Vendors to notify City of any contracts doing business with ICE during term of contract
    - Vendor's attestation and signature
    - Information can be requested and results of disclosures can be used to determine responsiveness, award new contracts and contract renewals/extensions
- **City Council has ultimate authority to award new contracts and contract renewals/extensions**

Next Steps

- Request committee feedback and next steps



Thank You

Statutory Procurements

(IFB, RFCSP, RFQ)

Vendor Accountability and Disclosure

- Information can be requested but cannot be used to affect responsiveness

Policy to not do business with entities providing support to I.C.E

- Cannot limit competition
- Council can elect to not award to recommended responsible low bidder

Non-Contracting Policies

- City Council has the ultimate authority to award new contracts and contract renewal and extensions

Procurement Standards and Values-Based Criteria

- State law restricts criteria and specifications (low bid procurements)
- Evaluation criteria must focus on quality /competence (RFCSP, RFQ/Alternate delivery)

Non-Statutory Procurements

(Discretionary – RFQ/RFP)

Vendor Accountability and Disclosure

- Disclosures can be required
- May be limited due to contracts funded by federal and state grants

Policy to not do business with entities providing support to I.C.E

- Results of disclosures can be used to determine responsiveness

Non-Contracting Policies

- Results of disclosures can be used to determine responsiveness
- City Council has the ultimate authority to award new contracts and contract renewal and extensions

Procurement Standards and Values-Based Criteria

- Civil rights, community impact, and ethical business practices can be applied in evaluations
- Values-based criteria would need to be established

Outreach to Peer Cities

- **Outreach** – 21 total cities (6 Texas cities and 15 other U.S. cities); 9 responded:
  - **Texas Cities**
    - City of Austin
    - City of Corpus Christi
    - City of Dallas
    - City of Houston
    - City of McAllen
    - City of El Paso
  - **Other U.S. Cities**
    - Las Angeles, California
    - San Jose, California
    - Seattle, Washington

Outreach Findings

- No cities that responded, have procurement specific policies and practices regarding vendor accountability, non-contracting policies, or values-based prohibiting doing business with entities providing support to I.C.E.

- Cities have generally organizational directives such as:
  - Background Checks and Immigrant Status and Federal Immigration Enforcement Notification Requirements, included in contracts.
  - Letters sent to contractors on ordinance prohibiting use of city resources and data, for the purposes of federal immigration enforcement; and provisions protecting data included in contracts.
  - Organizational policy through Council action, prohibiting I.C.E from using City-owned or City-controlled parking lots, vacant lots, and garages as operational bases/staging areas,
    - Installation of restricted-use signage and physical access gates at multiple municipal facilities, including libraries and community centers.
    - City employees required to immediately report any observed immigration enforcement activity on City property to supervisors.

Outreach Findings, cont.

- These additional directives from peer-cities include:
  - Restrictions on I.C.E. use of City-owned or City-controlled properties
  - Physical access controls at select municipal facilities
  - Requirements for City staff to report observed immigration-enforcement activity on City property

Procurement Method Applicability

Statutory – Not Applicable

Invitation for Bids (IFB)

- Lowest Responsible Bidder
- Specifications and Price
- **LGC Chapter 252 and 271**
- Office Supplies
- Fleet; Auto Parts
- Furniture
- Street & Construction Materials and Services

Request for Competitive Sealed Proposals (RFCSP)

- Best Value
- Additional Factors Other than Price
- **TX Gov't Code Chapter 2269**
- Janitorial Services
- Landscaping Services
- Electrical, Plumbing, HVAC Services
- High Technology
- Construction Services

Request for Offer (RFO)

- Exempted or Cooperative Procurements
- **LGC Chapter 252 and 271**
- Fire Bunker Gear
- Rescue Equipment
- Specialty Fleet Vehicles
- IT License Agreements

Non-Statutory – May Apply

Request for Qualifications (RFQ)

- Based on Qualifications and Capabilities
- **TX Gov't Code Chapter 2254 and 2269**
- Planning
- Architectural & Engineering
- Land Surveying

Request for Proposals (RFP)

- Multiple Criteria including Price
- **TX Gov't Code Chapter 2254 and 2269**
- Financial
- Consulting, Marketing, Management & Training
- Concession/License Agreements

Insurance, Liability, and Risk Exposure

Evaluate how vendor participation in detention operations affects liability exposure, insurance costs, and reputational risk for both the City and its contractors and assess whether additional safeguards or exclusions are warranted.

Analysis:

- Difficult to quantify impact of the City doing business with a contractor doing business with I.C.E.

Procurement Process Review Update

Economic and Workforce Development Committee

August 31, 2026

Presented by:

Victoria Roeder, Deputy Finance Director

Background

- In August 2025, Mayor released 2025–2029 Council Committees and Rosters
  - Economic and Workforce Development Committee (EWDC) tasked to:
    - Collaborate with diverse business stakeholders
    - Review City procurement processes to ensure access to full talent pool

- In December 2025, recommendations presented to City Council:
  - Key focus areas for Procurement Review
  - Proposed timeline for completion

- On February 24, 2026, EWDC briefing on key focus areas
  - Capacity-Building & Supplier Engagement
  - Procurement Process
    - Staff recommended we align with the SAP upgrade
    - Obtain feedback from stakeholders

SAP Upgrade (COSAConnect)

- Proposed process improvements to be incorporated into the SAP Upgrade
- SAP Upgrade aims to streamline the COSA financial system to include procurement workflows and enhance system efficiency
- Work with vendors, suppliers, COSA partners, and advocacy groups for feedback during implementation
- SAP Upgrade targeted to go live October 1, 2027

COSAConnect Finance

Phase 03

6 Workstreams

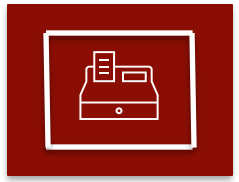
- Source to Pay
- Order to Cash
- Hire to Retire
- Acquire to Retire
- Budget to Report
- Manage IT-MIT

Go-Live 2027



Source to Pay

Procurement processes from solicitations & vendor responses, through vendor invoice payments.



Order to Cash

Revenue Collections, and one customer handling.



Hire to Retire

Payroll modules, time management and its integrations with existing **HR** functions.



Acquire to Retire

Capital Asset processes from purchase & plant maintenance, through disposition



Budget to Report

Financial Reporting for grants, capital projects, operating funds, & key financial reports.



Manage IT-MIT

Security, Data Governance, Archiving, & Analytics

External Stakeholder Participation

Vendors & Suppliers 1

- Selected according to award history & contract value
- Focuses on local & small businesses

COSA Partners 2

- Supply SA
- Business Dev Organizations
- Launch SA/Geekdom

Advocacy Groups 3

- Community Stakeholders
- Trade/Professional Organizations
- Chambers of Commerce

Vendors/Suppliers selected based on engagement with COSA Contracts and Bid Activity over the past five fiscal years.

External Stakeholder Approach

PLANNING
June – August

- Develop external stakeholder approach
- Review and finalize the external stakeholder repository
- Complete the external stakeholder communications planning process

COMMUNICATION
September-October

- Send out external stakeholder survey
- In person meetings with stakeholders
- Provide update on the stakeholder feedback

Conclusion

- Committee input on external stakeholder participation
- Continue discussion and engagement with vendors and suppliers in SAP upgrade
- Share external stakeholder survey insights with Committee
- Continue briefing the Committee



Thank You