



Agenda

Planning and Oversight Committee

September 16, 2025

11:30 AM

**Missouri Job Center
1660 N Campbell Ave
Springfield, MO 65803**

Join Zoom Meeting

<https://zoom.us/j/95505975964?pwd=wDDcaWzgLEbPbtzS4IU1ndfFKacvRQ.1>

Meeting ID: 955 0597 5964

Passcode: 546951

1. Call to Order

2. Approval of Minutes

2.1. July 15, 2025, Planning & Oversight Committee Meeting Minutes

3. New Business

3.1. Basic Skill Deficient Policy

3.2. Co-Enrollment Policy

3.3. Required Partners Survey

4. Reports

4.1. Performance Report (*Karen Dowdy*)

4.2. Monitoring Report (*Karen Dowdy*)

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In accordance with Americans with Disabilities Act (ADA) guidelines, if you need special accommodations when attending any Department of Workforce Development meeting, please notify the Executive Secretary at 417-841-3346 as soon as possible to ensure our ability to accommodate your needs.

4.3. Workforce Update *(Ericka Schmeeckle)*

5. Adjournment

Call to Order

A regular meeting of the Ozark Region Workforce Development Board's Planning and Oversight Committee was held via Zoom on Tuesday, July 15, 2025. The meeting convened at 11:30 a.m., with Committee Chair Dan Montgomery presiding.

Attendance

√ *Notes in attendance:* * *Notes Board Member*

<i>Committee Members</i>	Dr. Abby Benz*	√Charlyce Ruth	√Dan Montgomery*, <i>Chair</i>
	Jeremy MacLaughlin*	Michelle Clark*	Susan Johanson*
<i>Guests in Attendance</i>	Kevin McGill*, Bill Skains, Carmen May, Cindi Koenneker, Karen Dowdy, Katherine Proctor, Maddy MacNeil, and Tracy Keithley		

Approval of Minutes

May 20, 2025, Planning & Oversight Committee Meeting Minutes

Mr. Montgomery asked for any adjustments to the minutes.

*A motion was made by Charlyce Ruth and seconded by Kevin McGill to approve the minutes of the May 20, 2025, meeting as presented. **Motion carried.***

June 3, 2025, Planning & Oversight Committee Meeting Minutes

Mr. Montgomery asked for any adjustments to the minutes.

*A motion was made by Kevin McGill and seconded by Charlyce Ruth to approve the minutes of the June 3, 2025, meeting as presented. **Motion carried.***

New Business

One-Stop Operator Monitoring Report

Ms. Dowdy explained that WIOA and the State required the monitoring report. She stated that one of her concerns was the low partner engagement and feedback. She recommended that the One-Stop Operator survey the partners with items like frequency of meetings. She noted that the results suggested that partners wanted to meet monthly or quarterly.

*A motion was made by Charlyce Ruth and seconded by Kevin McGill to accept the One-Stop Operator Monitoring Report. **Motion carried.***

Substate Monitoring Report

Ms. Dowdy explained that the report was a culmination of all her monitoring reports for the year. She explained the areas she had monitored and the number of files that were reviewed in each section. She also noted the concerns she had during the monitoring. Many of the concerns related to case notes, specifically that staff did not fully describe the activity, notes were submitted late, and documents were either missing or uploaded late. Mr. Montgomery inquired about the process of discussing concerns with staff. Ms. Dowdy explained that typically she would sit with the staff and their supervisor to discuss her review of files, and a deadline would be set to have any corrections made.

Mr. Skains inquired what the concerns were. Ms. Dowdy explained that the concerns surrounded late case notes and that the staff were working on ways to overcome the concern.

	<i>A motion was made by Kevin McGill and seconded by Charlyce Ruth to accept the Substate Monitoring Report. Motion carried.</i>
<i>EO Program Analysis</i>	Ms. Dowdy explained that the report was an analysis of the programs to identify if discrimination had occurred. She noted there were a few areas that were identified as possibly having an adverse impact. She gave an example that for the Adult program, the 55+ demographic appeared to be underserved. Through further investigation, many individuals in the demographic were not seeking training for a second career but rather supplemental income. Ms. Dowdy noted that, overall, she did not find discrimination, but instead, low numbers affected the report. <i>A motion was made by Charlyce Ruth and seconded by Kevin McGill to accept the EO Program Analysis. Motion carried.</i>
Reports	
<i>Performance</i>	Ms. Dowdy presented the performance report as of Q3 PY2024. • Timeframes: ○ Program years operated on a quarter model for July 1, 2024, through June 30, 2025. ○ Quarter dates: ▪ Quarter 1: July 1 – September 30 ▪ Quarter 2: October 1 – December 31 ▪ Quarter 3: January 1 – March 31 ▪ Quarter 4: April 1 – June 30 • Measures: ○ The “Employment Quarter 2,” “Employment Quarter 4,” “Credential,” and “Median Earnings” measures were based on participants who had exited. ○ The “Skill Gains” measure was based on participants who were actively in training. ○ The “Median Earnings” measure data was used by matching MOJobs and the UI System. The measure looks at the middle wage of rank order, not an average of all wages. ○ Participants were considered to have exited the program if they had been enrolled and were out of the program after 90 days of no services or reportable activity. • Ms. Dowdy explained the status of the data reported in the performance measures. • For the Adult Program measures: ○ Employment Rate Q2 had met the requirement and was at 91.6% of the goal. ○ Employment Rate Q4 had not reached the requirement and was at 84.92% of the goal. ○ Credential had not reached the requirement and was at

	85.14% of the goal. ○ Measurable Skill Gains exceeded the goal by 30.93%. ○ Median Earnings exceeded the goal by 10.59%. ○ Ms. Dowdy noted that the Credential measure needed one more reportable participant to receive a credential to reach the requirement. ● For the Dislocated Worker Program measures: ○ Employment Rate Q2 exceeded the goal by 17.65%. ○ Employment Rate Q4 met the requirement and was at 98.94% of the goal. ○ Credential had not reached the requirement and was at 63.29%. ○ Measurable Skill Gains exceeded the goal by 51.52%. ○ Median Earnings exceeded the goal by 45.58%. ● For the Youth Program measures: ○ Employment Rate Q2 exceeded the goal by 2.15%. ○ Employment Rate Q4 exceeded the goal by 1.85%. ○ Credential exceeded the goal by 56.25%. ○ Measurable Skill Gains had not met the requirement and was 78.39% of the goal. ○ Median Earnings exceeded the goal by 39.49%. ○ Ms. Dowdy noted that an increase of two measurable skill gains would achieve the requirement and that Youth staff were working to gather and enter grades. ● For Wagner-Peyser: ○ Employment Rate Q2 had reached the requirement and was at 99.7% of the goal. ○ Employment Rate Q4 exceeded the goal by 4.83%. ○ Median Earnings exceeded the goal by 17.1%. ● Training: ○ 72 Individuals were actively participating in training ▪ 45 in the adult program ▪ 7 in the dislocated worker program ▪ 20 in the youth program ○ 22 were funded through WIOA; others had been co-enrolled in other grant opportunities. ▪ 16 adults with an average cost of \$4,182.65 for tuition. ▪ 2 dislocated workers with an average cost of \$1,219 for tuition. ▪ 14 youth with an average cost of \$11,328.50 for tuition. (Included youth since April 1, 2024) ● Work Experience: ○ 26 youth had participated in a work experience opportunity during the 2024-25 program year, receiving at least the minimum wage of \$13.75 per hour.
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	• Supportive Services: ○ 30 individuals received Supportive services. ▪ There were 56 supportive services. ▪ Supportive services included transportation services (i.e., gas cards or bus passes) and work-related assistance (i.e., apparel for work). ○ Two youth participants received a \$200 incentive for completing a work experience, and one youth received a \$250 incentive for completing training. • Intensive Case Management: ○ Ms. Dowdy explained that participants receiving intensive case management required more work with a case manager on specific skills, or identifying or removing barriers. She noted that staff also referred clients to other resources in the area when applicable. • Visits to the Job Centers (July 1, 2024 – June 30, 2025): ○ 15,405 individuals were assisted across the three locations. ▪ 8,518 individuals were assisted at the Springfield location. ▪ 6,119 individuals had been assisted at the Branson location. ▪ 768 individuals were assisted at the North office. ○ Ms. Dowdy shared charts regarding breakdowns of foot traffic by location and county. Mr. Skains asked if there was a way to meet all measures. Ms. Dowdy stated she believed the final reports were released in October. Ms. Keithley noted that long-term training may affect the reports as well. Ms. Keithley stated she and the staff were doing their best to meet the measures.
<i>Monitoring</i>	Ms. Dowdy stated she had completed monitoring Quarter 4 for Youth and training. For training, she reviewed 7 files, and her concerns were late notes and missing documents. For Youth, she reviewed 11 files, and her concerns were the delay in uploading documents, not fully describing an activity, incomplete training plans, and late notes. Ms. Dowdy stated that the State had conducted a monitoring and found similar concerns to those that had been previously noted. The monitoring had one finding, which required training for the “Individual Service Strategy” for youth, essentially the employment plan. The concern related to barriers was not being addressed based on the objective assessment. She noted that a training occurred on July 10th to address the issue. Some areas of concern were noted and were being looked into, but the monitoring, overall, went well.
<i>Workforce Update</i>	<i>No Report was given.</i>
<i>Adjournment</i>	
	The meeting was adjourned at 12:24 pm.

Notes taken by: Maddy MacNeil, Executive Secretary

Next Meeting: September 16, 2025

Draft

Basic Skill Deficient (BSD) Policy

Basic Skills Assessment

Introduction

The following Basic Skills Assessment shall be followed to ensure individuals are assessed for Basic Skills Deficiencies. Testing accommodations will be made to any test administration procedure to provide equal access for individuals with disabilities.

Background

The Workforce Innovation and Opportunity Act (WIOA) focuses on serving “individuals with barriers to employment” and seeks to ensure access to quality services. WIOA states recipients of public assistance, other low-income Individuals, and individuals who are **basic skills deficient**, must receive priority for individualized career services and training services.

For purposes of WIOA, Basic Skills Deficient (BSD) means, an individual:

- Who is a youth, that has English, reading, writing, or computing skills at or below the eighth (8th) grade level on an accepted standardized test; or
- Who is a youth or adult, that is unable to compute or solve problems, or read, write, or speak English, at a level necessary to function on the job, in the individual’s family, or society.

Determining basic skills deficiency during intake assists in qualifying customers for eligibility, allows for quality referrals, and can determine program effectiveness.

Determination of WIOA Youth eligibility based on the BSD barrier

A formalized assessment will be administered to evaluate the youth’s strengths as well as any areas of deficiency in the academic skills of Reading, Math, and Language. One or more of the following assessments may be utilized:

- Test of Adult and Basic Education (TABE)
- ACT
- Health Education Systems Inc. (HESI)
- Wonderlic
- Test of Essential Academic Skills (TEAS)
- Comprehensive Adult Student Assessment System (CASAS)
- WorkKeys
- Accuplacer

These assessments may be administered by the Region’s AEL programs, the client’s chosen training provider, or workforce staff.

Assessment results are utilized to document basic skill deficiencies for an eligibility barrier or to determine the youth’s ability to be successful in an academic program.

Determination of Basic Skills for the Objective Assessment (OA)

WIOA requires every youth to complete an Objective Assessment (OA) to evaluate the basic skills, occupational skills, prior work experience, employability, interests, aptitudes, supportive service needs,

Basic Skill Deficient (BSD) Policy

Basic Skills Assessment

and developmental needs of the participant. The OA must identify the career pathway for the youth participant and is used to develop a corresponding Individual Service Strategy (ISS).

The requirement to review basic skills as part of the objective assessment process is not the same as conducting a basic skills assessment for eligibility determination for the basic skills deficient barrier or conducting a basic skill assessment for determination of an education functioning level gain within the Measurable Skills Gain indicator. If using the basic skill deficient component of WIOA Youth eligibility in WIOA(3)(5)(A), programs must use a generally accepted standardized test, which DOL defines as an approved test from the list of tests the Secretary of Education determines to be suitable for use in the National Reporting system for Adult Education¹

The Ozark Region has adopted a screening tool to help identify if an individual is basic skills deficient. This Basic Skills Screening Tool is required for all WIOA youth applicants. The Basic Skills Screening Tool will help assess the youth for the required basic skills section of the OA and help determine if additional testing is needed to evaluate “basic skill deficient”. The Basic Skill Screening Tool must not be used to determine a youth’s educational needs.

A youth, who is unable to complete the screening tool without assistance and answers “No” to one (1) or more questions, must automatically be assessed as basic skills deficient using at least one of the approved assessments identified in the previous section, [school records, or other assessment as approved by the program supervisor that provide sufficient details to determine skill level.](#)

A youth, who can complete the screening tool without assistance and answers “Yes” to all the questions, has satisfied the basic skills requirement of the OA. However, for youth entering training services, additional assessments may be used to determine the appropriateness of the training program.

Determination of BSD for Adult Priority of Service

The Basic Skills Screening Tool will help identify if an individual is basic skill deficient for the purposes of priority of service and referrals for Adults or Dislocated Workers. The screening tool should be given prior to conducting any assessment test. The tool is for identification of priority of service and for referral purposes.

Anyone unable to complete the screening tool without assistance or answers “No” to one (1) or more questions, must automatically receive a referral for adult basic education services. Any WIOA Adult participant should receive priority of services as having a basic skills deficiency.

Approved by the Workforce Development Board August 3, 2022 and by the Council of Local Elected Officials October 12, 2022.

¹ Department of Labor Employment and Training Administration, Strategies and Considerations: A Brief on Youth Assessments, Youth Connections. [ITA Strategies and Considerations Youth Assess 20210205 \(1\). pdf](#)



Co Enrollment and Exit Policy

The Ozark Region utilizes an integrated service model that promotes universal access, consistency of services, and dual enrollment of customers into programs. An overview is provided below.

- Customers seeking assistance in the Ozark Region receive a welcome and check-in using the Kiosk. Customers are then given computer access to begin their Wagner-Peyser registration. All customers meet with staff where individual needs and eligibility for a variety of programs and services are reviewed.
- The Ozark Region follows the State's policies for co-enrollment of WIOA, TAA, and all Wagner-Peyser services. When appropriate, dual/multi enrollment is used to expedite the customer's training plan and to leverage all available funding sources.
- All of the Labor Exchange services authorized by WP are also classified as WIOA Basic or Individualized Career Services and, therefore, must be delivered by all Missouri Job Center staff. The only Missouri Job Center services that are restricted to State merit staff are those funded by the Jobs for Veterans State Grant.
- Career Services for both WIOA Title I Adult and Dislocated Worker customers, and for Title III WP customers, are to be promptly provided by all appropriate staff, regardless of their employer of record or funding source. Staff must enroll and provide services in the program in which they are funded by. These services may be recorded by any staff authorized to utilize the statewide electronic case-management system case data, under the appropriate program providing the service.
- To ensure personnel are fully knowledgeable about all MJC programs and services, staff members participate in Dislocated Worker and Trade Act service integration training, Missouri Association of Workforce Development (MAWD), and National Association of Workforce Development Professionals (NAWDP) capacity building sessions. They also participate in intra-agency teams and committees that help with case management activities.

Mandatory Co-Enrollment

- All job seekers receiving staff-assisted services must be enrolled in the Wagner-Peyser program.
- Any Career Service provided by WIOA-funded staff that is not defined as self-service or informational, requires, at a minimum, the completion of a WIOA Adult Basic Career (ABC) enrollment. WIOA staff must complete this enrollment directly after completing a Wagner-Peyser enrollment; it is recommended that the Common Intake feature be utilized. If enrolling into Dislocated Worker program, full Dislocated Worker eligibility is required. .



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- All TAA participants must be co-enrolled in the WIOA Dislocated Worker program.
- All National Dislocated Worker Grant requirements will be dependent on the individual grant and outline in the respective manual.
- ~~All Missouri SkillUP (skills, training, or work experience for Food Stamp recipients) participants who receive training must be co-enrolled in the WIOA Adult program.~~
- Co-enrollment with other job training grants will be considered based on the specific grant and availability of funds.

Priority of Service

The Region will follow the local Priority of Service policy, which rate will not be lower than 50.1%.

Exits

A “common exit” approach is used by the system for WIOA Title 1 Adult, Dislocated, and Youth, Title III Wagner-Peyser, and TAA programs.

A “soft” exit occurs when an individual has not received a documented staff-assisted service in 90 days in Wagner-Peyer, WIOA, or TAA (Trade Act).

A “hard” exit may be requested under the following conditions:

- If the participant exits the program because he or she has become incarcerated in correctional institution or has become a resident of an institution or facility providing 24-hour support such as a hospital or treatment center during the course of receiving services as a participant.
- If the participant exits the program because of medical treatment and that treatment is expected to last longer than 90 days and precludes entry into unsubsidized employment or continued participation in the program.
- If the participant is deceased.
- If the participant exits the program because the participant is a member of the National Guard or other reserve military unit of the armed forces and is called to active duty for at least 90 days.
- If the participant is in the foster care system as defined in 45 CFR 1255.20(a), and exits the program because the participant has moved from the area as part of such a program or system. (Youth only)
- If the participant is a criminal offender in a correction institution under section 225 of WIOA.

Exit Follow-Up

WIOA Adult and Dislocated Worker

For customers who are not showing on the performance rosters as reporting wages, staff must complete the follow-up tabs for the 2nd and 4th quarter after exit. Staff are required to contact participants to: obtain supplemental employment information (if applicable) or determine that the customer is not employed and offer and provide the appropriate services as needed.



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For customers that received WIOA training services, staff must complete the follow-up tabs for the 2nd quarter after exit. Staff are required to contact participants to collect Training Related to Employment information.

WIOA Youth

Staff must complete the WIOA follow-up tab for all four quarters after exit. For reporting purposes, staff must complete all exit information, including, but not limited to, entered employment, school status, youth placement, and credential obtainment.

Staff must attempt different avenues to make contact with participants. These must be documented in the follow-up tab or in Case Notes.

First Revision 05/25/2021

Second Revision 03/08/2024 Approved by the Workforce Development Board 04/03/2024 and by the Council of Local Elected Officials on 04/12/2024.