

<p><b>WORKFORCE INVESTMENT BOARD OF TULARE COUNTY</b></p>	<p><b>DATE:</b> <b>December 11, 2023</b></p>
<p><b>WORKFORCE INNOVATION AND OPPORTUNITY ACT TITLE 1</b></p>	<p><b>SUBJECT:</b> <b>WIB Success Story Policy and Process</b></p>

**WIB POLICY MEMO**

**TUL PM 23-03**

**TO:**           WIB SUBRECIPIENTS  
                  WIB STAFF

**SUBJECT:**    WIB Success Story Policy and Process

**EXECUTIVE SUMMARY:**

This policy memo provides guidance and processes for developing success stories for WIOA customers.

This policy memo contains no state-imposed requirements.

Effective January 1, 2024, all WIB Subrecipients must follow the WIB Success Story Policy and Processes outlined in this policy memo.

This policy memo supersedes WIB Policy Memo TUL PM 22-03 dated December 7, 2022.

**DURATION:**

This policy memo is in effect until June 30, 2025.

**REFERENCES:**

- Current Subrecipient Career Services Contracts
- Current Subrecipient Youth Services Contracts

**BACKGROUND:**

To effectively communicate the value of the services provided by the Employment Connection system, it is essential to collect success stories from a wide array of customers. Protecting the privacy and dignity of our customers is a top priority, and we should never assume that a customer’s story is ours to tell. For this reason, the Workforce Investment Board of Tulare County has adopted the following Success Story Policy and Process, which shall be followed by all WIB Subrecipients.

## **POLICY AND PROCEDURES:**

When a customer enters the Employment Connection system and is enrolled in any WIOA-funded service, they will be asked to sign the *WIB704* form, and approve a statement allowing the WIB to share a customer's photo and statements. This document is part of the customers' permanent file. It allows Employment Connection staff to submit success stories to the WIB to be forwarded to various funding sources as required by each grant/funding source. These success stories will not be shared publicly to protect the identity and privacy of our customers.

When it is determined that a customer success story is going to be shared publicly, for example, on social media, annual reports, newsletters, websites, etc., the WIB requires that the customer sign the *WIB Consent and Release Form*. This form provides a more explicit explanation to the customer that the WIB may share their photo and statements with the public, provides them the opportunity to decline to share their information, and informs them of their right to decline to share their information in the future. Prior to signing the *WIB Consent and Release Form*, Customers should be informed that they will be asked to approve the success story before it is published.

While the following processes may delay success stories being shared, they will ensure that the content shared from our system is accurate and in line with our goal of protecting the privacy and dignity of each of our customers.

### **Developing Customer Success Stories to be shared with grant/funding sources only:**

1. All customers enrolling in WIOA services must sign the *WIB704* form and mark their approval of the media release statement.
2. Program supervisors will review, approve, and upload customer success stories to the designated Success Story Folder on the Tulare WIB Google Drive according to each program's contract or statement of work requirements.
3. WIB analysts will submit success stories to the funding/grant sources.

### **Developing Customer Success Stories to be shared publicly:**

1. In addition to collecting the signed *WIB704 form*, Employment Connection staff will ask the customer to sign the *WIB Consent and Release Form*.
2. Staff will upload the signed *WIB Consent and Release Form* to the customers' case file.
3. Employment Connection supervisors or leadership shall review, approve, and upload all success stories to the designated Success Story Folder on the Tulare WIB Google Drive.
4. The WIB marketing team will edit the success stories for all programs including youth services, to suit the audience and platform on which the story will be shared.
  - a. Editing may include the removal of acronyms and program-specific jargon and refocusing of the story to highlight the customer's journey to success, removing last names, employer names, and other private information.
5. The marketing team will email the edited success story to the originating staff member.

6. The staff member will provide the customer with a copy of the edited story to review and approve.
  - a. The customer may ask for changes in the content to make the story more accurate or remove personal information they do not want to have shared publicly. This information will be communicated to the WIB marketing team.
7. Staff members will email the approved success story back to the marketing team for distribution.
8. Success stories that have been approved by the WIB for publication will be uploaded to the [Employment Connection System](#) shared Google Drive.
9. All approved customer success stories will automatically be included in the INNOVATORS by Design awards nomination process.

#### **Customer Success Story Submission Requirements:**

- Success stories must be submitted using the Success Story template found on the Employment Connection System [shared Google Drive](#).
- Uploaded success stories must be submitted as a Word Document (editable).
- Success stories should not exceed a single page, 1" margins, Calibri 12.
- Success stories must be reviewed, edited, and approved by the program supervisor or site leadership before it is submitted to the WIB.
- Success stories must be uploaded to the designated Success Story Google Folder using the following naming convention: Program Quarter\_Program or Grant.  
i.e.: Q1\_Adult.doc or Q2\_R2Y.doc
- If there are multiple success stories submitted for a program the naming convention will be: Program Quarter\_Program or Grant\_#.   
i.e.: Q1\_Adult\_#2.doc or Q2\_R2Y\_#2.doc
- Customer photos may be embedded in the text of the success story or submitted as a png or jpg file to the Success Story Google Folder using the success story naming convention above.

#### **Writing a Good Customer Success Story:**

Success stories need to have a beginning, middle, and an end to be complete. The beginning should include background information about the customer and describe the customer's initial goal(s), or the type of help they wanted. The story should include how the customer used the tools, resources, and information provided by the EC system to overcome barriers and challenges or grow their skills and abilities. The ending should include how the customer accomplished their stated goal(s) and how their life or situation has changed or been impacted by reaching the goal. Including customer quotes and pictures will always make the story more impactful.

#### **Questions to consider when writing a story:**

- How did the customer hear about our services?
- Why did the customer come to Employment Connection or one of our system partners?

- What goals did the customer set for themselves when they started their journey?
- What personal challenges did the participant face that was preventing them from finding employment on their own?
- What skills, education or work experience did the customer have?
- What career exploration activities did the customer participate in?
- What steps did the customer take to attain one or more milestones (completion of training, job placement, essential workplace skills, work ex., school enrollment, workshop completion, etc.)?
- How did Employment Connection (or youth@work) help the customer achieve their goals (coaching, supportive services, workshops, OST, talent pool)?
- Did staff provide additional assistance (partner referrals, co-enrollment, support services, etc.)?
- How has achieving their goal impacted their life (new job, providing for family, better living conditions, have reliable transportation, stopped receiving TANF etc.)?
- What future goals has the customer set for themselves?
- Include quotes from the customer about how Employment Connection (or youth@work) services and staff helped them on their journey?
- Before & after pictures of the customer?

All subrecipient customer success stories that include or reference WIB-Funded customers, programs, or projects must be approved by the WIB and follow the current co-branding guidelines specified in the most recent WIB Marketing and Co-Branding Directive.

**ACTION:**

Please bring this policy memo to the attention of all WIB Subrecipients and WIB Staff.

**INQUIRIES:**

Please direct inquiries regarding this policy memo to the WIB at (559) 713-5200.



Adam Peck  
Executive Director

## Job Seeker Success Story Form

Customer Name (first/last): \_\_\_\_\_

Customer CalJobs State ID: \_\_\_\_\_

Enrolled Program(s): \_\_\_\_\_

Subrecipient Staff Member: \_\_\_\_\_

Staff Member Email: \_\_\_\_\_

Supervising WIB Analyst/Coordinator \_\_\_\_\_

Supervisor Review Completed: Yes \_\_\_ No \_\_\_

Consent Form 704 Signed: Yes \_\_\_ No \_\_\_

WIB Consent and Release Form Signed: Yes \_\_\_ No \_\_\_ N/A \_\_\_

Grant Specific Release Form Signed: Yes \_\_\_ No \_\_\_ N/A \_\_\_

A success story should include background information about the customer and describe the customer's initial goal(s), or the type of help they were looking for. It should describe how the customer used the tools, resources, and information provided by the EC system to overcome barriers and challenges or grow their skills and abilities. Finally, it should tell what goal(s) was accomplished and how the customer's life has been impacted or changed by reaching the goal.

### Questions to consider:

- How did the customer hear about our services?
- Why did the customer come to Employment Connection or one of our system partners?
- What goals did the customer set for themselves when they started their journey?
- What personal challenges did the participant face that was preventing them from finding employment on their own?
- What skills, education, or work experience did the customer have?
- What career exploration activities did the customer participate in?
- What steps did the customer take to attain one or more milestones (completion of training, job placement, essential workplace skills, work ex., school enrollment, workshops, etc.)?
- How did Employment Connection (or youth@work) help the customer achieve their goals (coaching, supportive services, workshops, OST, talent pool)?
- Did staff provide additional assistance (partner referrals, co-enrollment, support services, etc.)?
- How has achieving their goal impacted their life (new job, providing for family, better living conditions, have reliable transportation, stopped receiving TANF etc.)?
- What future goals has the customer set for themselves?
- Include quotes from the customer about how Employment Connection (or youth@work) services and staff helped them on their journey?
- Before & after pictures of the customer?

**Customer Success Story:**

## Business Success Story Form

Business Name: \_\_\_\_\_

Program or Services Used: \_\_\_\_\_

Subrecipient or WIB Staff Member: \_\_\_\_\_

Staff Member Email: \_\_\_\_\_

Supervising WIB Analyst/Coordinator \_\_\_\_\_

Supervisor Review Completed: Yes \_\_\_ No \_\_\_

WIB Consent and Release Form Signed: Yes \_\_\_ No \_\_\_ N/A \_\_\_

Success stories should include background information about the business and state what the goal the business was trying to achieve. The story should also include what tools, resources, and services the EC, WIB, or y@w provided to help the business, and how the business found success since working with the EC or y@w.

### Questions to consider:

- How did the business hear about our services?
- Why did the business reach out to Employment Connection or one of our system partners?
- What goal(s) was the business trying to accomplish?
- What challenges did the business face that was preventing them from reaching their goals?
- What strategies or tactics has the business use in the past?
- What tools, resources, or services did the customer utilize (direct hire, recruitment event, OJT, Transitional Job, Work Ex., Labor Market Information)?
- How did Employment Connection, WIB or youth@work staff help the business achieve their goals?
- Did staff provide additional assistance including referrals to other agencies or organizations?
- How has achieving their goal impacted the business and their future success (able to fulfill orders, meet timelines, expand their workforce, improve their hiring practices, upskill employees)?
- What future goals has the business developed?
- Include quotes from the customer about how Employment Connection (or youth@work) services and staff helped them on their journey?
- Include photos of the business (on-stie, during an event, new hires etc.)

**Business Success Story:**