

WORKFORCE INVESTMENT BOARD OF TULARE COUNTY	DATE: December 7, 2022
WORKFORCE INNOVATION AND OPPORTUNITY ACT TITLE 1	SUBJECT: WIB Success Story Policy and Process

WIB POLICY MEMO

TUL PM 22-03

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, 2023, all WIB Subrecipients must follow the WIB Success Story Policy and Processes outlined in this policy memo.

DURATION:

This policy memo is in effect until June 30, 2024.

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 upload customer success stories to the designated [Success Story Google Folder](#) 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 all success stories before uploading them to the designated [Success Story Google Folder](#).
4. A WIB analyst will review the success story and notify the WIB marketing team if they determine that the story should be shared publicly.
5. 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.
6. The marketing team will email the edited success story to the originating staff member.

7. 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 with the WIB marketing team.
8. Staff members will email the approved success story back to the marketing team for distribution.
9. Success stories that have been approved by the WIB for publication will be uploaded to the [Employment Connection System](#) shared Google Drive.

Customer Success Story Submission Requirements:

- Success stories must be submitted using the (Success Story Form attached).
- 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.
ie: 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_#.
ie: 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.

*The Success Story Form can also be found in the [Success Story Google Folder](#).

Suggested Content for a Customer Success Story:

- Customer location (the city they live in or which EC location they went to)
- How the customer heard about our services
- Why the customer came to Employment Connection or one of our system partners
- Barriers that the participant faced that prevented them from finding employment on their own
- Goals the customer set for themselves when they started their journey
- How Employment Connection (or youth@work) helped the customer achieve their goals and how this has impacted their life (including what services they utilized)
- Any additional assistance that staff members provided (referrals to partners, co-enrollment, etc.)
- Attainment of one or more milestones like completion of training, job placement, direct hire, work experience, etc.

- Future goals 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

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 _____

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Customer Success Story: