

WORKFORCE INVESTMENT BOARD OF TULARE COUNTY WORKFORCE INNOVATION AND OPPORTUNITY ACT TITLE 1	DATE: July 1, 2025
	SUBJECT: Updated WIB Success Story Policy and Process

WIB POLICY MEMO

TUL PM 25-02

TO: WIB SUBRECIPIENT STAFF
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 July 1, 2025, 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, 2027.

REFERENCES:

Current Subrecipient Career Services Contracts

Current Subrecipient Youth Services Contracts

WIB Directive [TUL 19-03](#) Use and Confidentiality of Participants' Personally Identifiable Information (PII)

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 and youth@work 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 should 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 with the opportunity to decline to share their information, and informs them of their right to decline to share their information in the future. Before signing the *WIB Consent and Release Form*, Customers should be informed that they will be allowed to approve the success story before it is published.

While the following processes may delay success stories from being shared, it will ensure that the content shared by 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 internally or 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 story questionnaires to the funding/grant sources.

Developing Customer Success Stories to be shared publicly:

1. In addition to collecting the signed *WIB704 form*, Subrecipient staff will ask the customer to sign the *WIB Consent and Release Form*.
2. Subrecipient staff will upload the signed *WIB Consent and Release Form* to the customers' case file.
3. Subrecipient supervisors or leadership will review, approve, and upload all success story questionnaires to the designated Success Story Folder on the Tulare WIB Google Drive.
4. The WIB marketing team will develop success stories based on the submitted questionnaires for all programs (WIOA Adult, DW, Youth, and Special Grants) to suit the audience and platform on which the story will be shared adhering to PII policies.

5. The WIB marketing team will email the developed success stories to the originating Subrecipient staff member.
6. The Subrecipient staff member will provide the customer with a copy of the 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 must be communicated to the WIB marketing and program team(s).
7. Subrecipient staff will email the customer's approval of the success story to the marketing team for publication.
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 attached Success Story Questionnaire which can also be found on the Employment Connection System [shared Google Drive](#).
- Uploaded questionnaires must be submitted as a Word Document (editable).
- Success story questionnaires must be reviewed, edited, and approved by the Subrecipient staff supervisor or site leadership before it is submitted to the WIB.
- Success story questionnaires 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 story questionnaires 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 questionnaire naming convention above.

Choosing Customers to Feature in a Success Story:

Individuals and businesses featured in success stories should have accomplished their initial goals and the objective of the service/program they were enrolled in.

Many of our customers accomplish major milestones within our system (enrolling in or completing training, participating in a transitional job, joining the EC Talent Pool, etc.). While milestones along the customer journey are important, success stories must be connected to the accomplishment of their primary employment or training goals.

Example 1: A customer is enrolled in WIOA services and said their goal was to find a full-time job. The success story should highlight that they completed the job search process,

updated their resume, and were hired to a full-time position in their field of interest making a sustainable wage.

Example 2: If a customer is enrolled in a training program at a local school, the success story should highlight that they completed the training and were hired in their field of training.

Example 3: If a customer is enrolled in a special grant and their goal is to find full-time employment to support their family, the success story should highlight that they completed a transitional job or work experience contract, updated their resume with the new work experience, and then found full-time employment in their field of interest.

All customer (job seeker or business) 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 Seekers' Success Story Questionnaire

Customer Name (first/last): _____

Customer CalJobs State ID: _____

Enrolled Program(s): _____

Subrecipient Staff Member: _____

Staff Member Email: _____

Supervisor Review Completed: Yes____ No ____

Consent Form 704 Signed: Yes____ No ____

WIB Consent and Release Form Signed: Yes____ No ____

Grant Specific Release Form Signed: Yes____ No ____ N/A____

Answer the following questions in detail including dates, names, and examples.

1. Which EC Center or youth@work site and staff member(s) did the customer work with?
2. How did the customer find out about Employment Connection/youth@work services?
3. When choosing to enroll in WIOA services, what was the customer's primary goal/objective?
4. What skills, assets, experience, or transferable skills did the customer have when they began services?
5. What, if any, barriers to employment did the customer face that prevented them from finding employment on their own? If they had barriers, how were they addressed?
6. What Job Readiness activities (workshops, mock interviews, Job Connect, etc.) did the customer participate in? What new skills or attributes did the customer learn?

7. What Career Exploration activities did the customer participate in? What were the results? (What career path did they decide was best for them? Was training needed?)
8. Based on the customer's goals and career exploration results, what guidance or direction (job leads, recruitment events, training, etc.) was provided to them?
9. If the customer chose to enroll in a training program (OJT, OST, WEX, TJ), what type of program was it? Describe the program and include the name of the program (for OST) or any skills, certifications or credentials they obtained.
10. What milestones did the customer achieve and did they enroll in the EC Talent Pool? What new skills did the customer learn or obtain in this process?
11. What additional assistance (referrals to partners, co-enrollment, supportive services, etc.) did staff members provide to the customer?
12. Was the customer enrolled in a special grant? If so, what additional services did the customer participate in, and were they provided any additional services (participation in a work crew, additional referrals, supportive services, etc.)?
13. Did the customer achieve their primary goal(s), and how has the accomplishment impacted their life?
14. What future goals does the customer have for themselves?
15. Include quotes from the customer.
16. Include a picture of the customer.

Business Services Success Story Questionnaire

Business Name: _____

Program or Services Used: _____

WIB Business Services Staff Member: _____

Staff Member Email: _____

Supervising Coordinator _____

Supervisor Review Completed: Yes _____ No _____

Business Services Questionnaire

1. How did the business hear about our services?
2. What was the business trying to accomplish?
3. What challenges was the business facing that prevented it from reaching its goals?
4. What strategies or tactics did the business use in the past?
5. What tools, resources, or services did the business utilize (direct hire, recruitment event, OJT, Transitional Job, Work Ex., Labor Market Information, Job Connect, Sector Partnership)?
6. How did the Business Services team help the business achieve its goals?
7. Did staff members provide additional assistance (referrals to other agencies, resources, or tools)?

8. How has achieving their goal impacted the business and their future success (for example, being able to fulfill orders, meet timelines, expand their workforce, improve their hiring practices, upskill employees)?
9. What future workforce goals does the business have?
10. Include quotes from the customer.
11. Include photos of the business (on-site, during an event, new hires, etc.).