

Platinum Principles Checklists



Employee Excellence

Principle	Applied to Employee Excellence	YES	NO	Comments
Accessible	Employee takes breaks considering customer needs			
Competent and Accurate	<p>Information given is complete and accurate</p> <p>Seek help if a question is beyond your scope</p> <p>Minimum qualification for paraprofessional or professional in WIC are met</p> <p>Use customer's preferred language</p> <p>Be grammatically correct</p> <p>Opportunities are provided for learning and growth</p> <p>Attend trainings for WIC nutrition or administrative updates</p> <p>Assume responsibility for obtaining information if absent</p> <p>Promotional opportunities in job classification series based on knowledge/performance</p> <p>Know when to give information and when to help customer determine own path</p>			
Cultural Competency	<p>Trained in cultures served by site</p> <p>Observe and are sensitive to customs of clients from different countries</p> <p>Speaks in customers' language of preference</p>			
Education and Listens	<p>Make your customer the priority</p> <p>Use positive body language</p> <p>Limit interruptions</p> <p>Ask more than advise—use open-ended questions</p> <p>Listen and respond to concerns</p> <p>Adult education principles understood and used</p> <p>Computer documentation and other "mandated procedures" do not interfere with counseling dialogue/listening</p> <p>Explain what is needed at next visit</p>			
Efficient	<p>Keep workstation tidy</p> <p>Minimize waiting time in site or on telephone</p> <p>Anticipate customer or site needs</p> <p>Participate in continuous quality improvement</p>			

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Principle	Applied to Employee Excellence	YES	NO	Comments
Empathetic and Compassionate	<p>Listen and acknowledge customer concern</p> <p>Make a difference to that customer</p> <p>Assist each other to provide service</p> <p>Assist participants who are illiterate</p> <p>Make a “solid” referral when necessary-- give specific information or make the call for them</p> <p>Never refuse checks until every avenue to issue has been explored</p> <p>Use empathetic language “This is what I CAN do for you”</p> <p>Puts customer and organization above personal needs</p> <p>Resolve conflicts without escalating the situation</p>			
Empowered	<p>“Own” complaints and resolve it</p> <p>Appropriately ask for assistance if needed</p> <p>Employee has input into job responsibilities</p>			
Ethical	<p>Speaks truthfully</p> <p>Does not have a conflict of interest nor advise clients in a way that benefits self or family members.</p> <p>Does not take time, supplies or incentives from the site</p> <p>Observes oath of confidentiality</p>			
Polite and Friendly	<p>Smile</p> <p>Acknowledge customer; use customer’s name</p> <p>Speak in a soft voice</p> <p>Escort customer when possible or necessary</p> <p>Thank customer for coming to WIC</p>			
Flexible	<p>Is cross trained; can work in a variety of WIC site stations</p> <p>Adapts to new requirements in policy and procedures</p> <p>Sites are staffed equitably relative to other sites in the agency</p> <p>Helps coworkers when asked</p>			

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Principle	Applied to Employee Excellence	YES	NO	Comments
Respectful	Use eye contact Establish bond and relationship with the person who is the customer Respect customer's privacy, time and opinion Inform customer of approximate wait time Respect cultural differences in staff and customers Customer service is a priority Telephones do not interrupt counseling Cell phones are off or on vibrate Treat coworkers with the same respect you treat customers Seek and give feedback Consider different opinions without judging			
Voice	Communicate ideas to make WIC better Communicate your needs to WIC leaders Listen to and give feedback Participate in employee satisfaction survey Participate in Continuous Quality Improvement			

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Site Excellence

Principle	Applied to Site Excellence	YES	NO	Comments
Accessible	<p>Accessible to public transportation</p> <p>Signage is visible from street</p> <p>Parking is safe, sufficient, well lit & clean</p> <p>Business hours are posted</p> <p>Accessible via wheelchair and other ADA rules</p> <p>Reception is clean and clutter free</p> <p>Adequate space for strollers</p> <p>Area is free from dangerous cords, electrical outlets, falling objects</p> <p>Exits are clearly marked</p> <p>Fire extinguishers are visible</p> <p>Security is provided where needed</p>			
Competent and Accurate	<p>Educational messages and learning opportunities throughout site</p> <p>Instructional signage is stated positively (not "NO this; Don't that...")</p> <p>Breastfeeding support signage (ie "Breastfeeding Welcomed Here")</p> <p>Bulletin boards are fresh, relevant and frequently updated</p> <p>Community resources for self-referral are available.</p>			
Cultural Competency	<p>Visuals/artwork reflect cultural diversity of clients served at site</p>			
Education and Listens	<p>Group education topics are posted</p> <p>Displays are maintained</p> <p>Seating is arranged to promote facilitated discussion</p> <p>Audio visual equipment in good working order</p>			
Efficient	<p>"Greeter" functions as triage</p> <p>Adequate, well-designed space</p> <p>Lighting is appropriate and adequate</p> <p>Restrooms are obvious</p> <p>Work stations are well marked</p>			

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Principle	Applied to Site Excellence	YES	NO	Comments
	Customer flow is clear, Signage for “Check-in”			
Empathetic and Compassionate	Lack of barriers between staff and customer (i.e. high counters, glass separations) Seating is adequate, comfortable, clean Signage is positive and attractive Room temperature is adjustable and comfortable Accessible via wheelchair and other ADA rules Child-sized seating Play area for children Children’s books are available Toys are clean, age-appropriate and safe Diaper-changing area is available			
Ethical	Counseling and other areas where personal information is shared are designed to preserve privacy Protocols are in place for situation requiring maximum privacy for individuals Confidential information is not visible on desks or counters			
Polite and Friendly	Prominent “Welcome” sign Atmosphere is warm and inviting Visual clutter is at a minimum Restrooms and water are easily accessible Waiting areas have relevant information for adults and children			
Respectful	Private areas for conversation Breastfeeding room is available Group sessions start and end on time Appointment times are honored			
Voice	Staff lounge is comfortable and large enough to accommodate staff Area is clean and maintained by all staff Pertinent information is posted Worksite wellness information is available			

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Services Excellence

Principle	Applied to WIC Services Excellence	YES	NO	Comments
Accessible	<p>Telephone access is simple, direct, timely</p> <p>Customers may contact the WIC program by email</p> <p>Customer service is not interrupted by the telephone in site</p> <p>Calls not answered by a person are returned within specific timeframe shared with customer when they leave a message (ie we will return your call in 2 hours--no later than 24 hours on a weekday)</p> <p>Appointment reminders are used (mail, telephone, text, email)</p> <p>Referrals are seamless</p>			
Competent and Accurate	<p>Informed staff share wait time with customers</p> <p>Informed staff share today's services for the customer</p> <p>Accurate information is given by competent staff</p> <p>Contact health care provider to retrieve medical information</p> <p>Perform height and weight measurements if information is not available</p> <p>Share nutrition information with health care provider when participant requests</p> <p>Local agency website provides customer information about WIC</p>			
Cultural Competency	<p>Training is provided on cultural competence for all cultures served in WIC</p> <p>Handouts and materials are available in different languages of clients served</p> <p>Staff speak in customers' language of preference</p>			
Education and Listens	<p>Education provided in learner-centered format</p> <p>Facilitator has good presentation and facilitation skills</p> <p>Facilitator is enthusiastic and shows genuine interest in topic</p> <p>Materials are available in participants' language.</p>			

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Principle	Applied to WIC Services Excellence	YES	NO	Comments
Efficient	<p>Monitor site flow for efficiency</p> <p>Supervisor modifies staff assignments to remove bottlenecks</p> <p>Staff are trained in technology so technology challenges aren't a hindrance</p> <p>Appointments are scheduled appropriate for staffing</p>			
Empathetic and Compassionate	<p>Policies allow for exceptions with protocols for documentation</p>			
Empowered	<p>Customer has a choice of when to come to WIC</p> <p>Customer has a choice of education topic</p> <p>Education is offered in a variety of formats: group, individual, text, online etc.</p>			
Ethical	<p>Participants receive WIC services equally without discrimination</p> <p>Demographics are regularly reassessed</p>			
Polite and Friendly	<p>Engage children</p> <p>Group topics are fun and topical</p>			
Flexible	<p>Provide as much service as customer and time allow</p> <p>Know when and how to make exceptions</p> <p>Adapts to participants needs</p>			
Respectful	<p>Follow-up new families who do not attend orientation and arrange for them to participate</p> <p>Give them as many WIC services as possible if they come to the site</p> <p>Listen with empathy if they don't come when expected</p> <p>Give unpleasant news compassionately</p>			
Voice	<p>Customer provides feedback about WIC services for Quality Improvement</p> <p>Complaint procedure is easy and clear to customers</p> <p>Supervisor is available to resolve conflicts</p>			