

Vermont Assembly of Home Health Agencies  
Gold Star:  
Excellence in Home Care Award

2009 Workbook

Sponsored by  
Vermont Assembly of Home Health Agencies (VAHHA)  
and  
Better Jobs Better Care  
Community of Vermont Elders (COVE)

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The Gold Star Program is designed to recognize home health agencies that employ Best Practices for recruitment and retention of caregivers, particularly direct care staff. Research in Vermont and elsewhere has shown that several different approaches, referred to in this document as *Best Practices*, lead to improved recruitment and retention rates. Successful recruitment and retention, in turn, contribute to improved quality of care for clients and employee satisfaction.

A committee composed of representatives from several Vermont home health agencies, as well as representatives of the Vermont Assembly of Home Health Agencies (VAHHA) and the Better Care Better Jobs project at the Community of Vermont Elders (COVE) developed the Gold Star Program. The Vermont Nursing Home Gold Star Employer Program served as a model for the VAHHA Gold Star Program.

Every VAHHA member is eligible for Gold Star recognition. Home health agencies that receive this recognition demonstrate use of at least one *Best Practice* in their recruitment and/or retention approaches.

The following discussion provides more information on *Best Practices* and the process for achieving Gold Star recognition.

## **Best Practices**

Identifying specific *Best Practices* was based on research within Vermont and elsewhere in the nation. The committee looked for work place approaches that had demonstrated a positive impact on recruitment and retention. Of particular concern was the impact on direct care staff such as Licensed Nursing Assistants.

Based on this research, *Best Practices* were identified in seven different areas:

1. Staff recruitment
2. Orientation
3. Staffing levels and work hours
4. Professional development and advancement
5. Supervision: training and practices
6. Team approaches
7. Staff recognition and support

Specific practices within each of these areas have been shown to improve employee retention. The Gold Star Program is based on promoting practices within these seven areas. Examples of practices are outlined in the following pages.

## 1. Staff Recruitment

- Community outreach & involvement: Home health agency partners with community-based agencies and with local schools to introduce career options.
- Collaboration with other agencies: Home health agency works with other health and non-health care providers to advertise for and train new workers.
- Screen for successful employees: Home health agency has a multi-step application process that includes initial interview, written test, call-back requirements, and meeting with staff; home health agency offers entry level position which can lead to LNA training for interested employees.
- Honest description of job duties and expectations: Home health agency provides opportunity for applicants to ask questions of present employees in similar position.
- Direct care workers: Director care workers are involved in recruitment, developing interview questions and interviewing applicants.

## 2. Orientation

- Standardized orientation: Staff orientation that provides consistent, well-developed orientation program covering information new employees need in order to understand all aspects of the organization (e.g., printed orientation manual that includes all personnel policies, appropriate information on client care policies and procedures, and organizational structure).
- Regular follow-up with new staff : Scheduled meetings with supervisor.
- Hands-on training: Training specific to required tasks & responsibilities, including opportunity to shadow experienced staff to prepare for job.
- Mentoring and support for new employees: Trained mentors provide orientation and training; new staff members are paired with long-term employees.

## 3. Staffing Levels and Work Hours

- Hours: Stable, reliable hours sufficient to meet employee's needs.
- Flexible scheduling: Work with staff members to create schedules that best meet their needs and address client needs.
- Overtime: Overtime is not coercive, pressured or frequently requested: Agency tracks overtime hours, examines patterns to identify problem areas and seeks to keep overtime at a minimum.
- Safe work loads: Determine comfortable staffing levels for good client outcomes, quality of care, and client acuity levels.

#### 4. Professional Development and Advancement

- Career ladders: Agency provides specific structures to develop skills, increase responsibilities, and increase wages (e.g., program that provides training in mentoring, coaching, and leadership skills; increases job responsibilities in these areas; and brings increased wages).
- Cross disciplinary training: Skill development across programs to enable employees to float across agency programs.
- Mentoring: Mentoring programs for experienced staff to mentor newer staff.
- Training in specialized care: Training to provide Alzheimer's care, pain management programs, and palliative care programs.
- Training: Ongoing training opportunities on site or through financial support of other programs such as tuition reimbursement programs to enable LNAs to train as LPNs and LPNs to train for RN, and partnerships with local colleges to develop leadership training programs.

#### 5. Supervision: Training and Practices

- Training for all supervisory staff: Training provided on cultural competence, problem solving, communication, and coaching skills (e.g., specific training programs for supervisory staff including funded seminars).
- Needed Tools: Provide management staff with tools needed to succeed: Adequate time available for supervisors to mentor and coach direct care staff; coaching and supervision for managers to learn from situations and mistakes; administration support for management decisions.
- Accessible management and supervisory staff: Administration keeps an "open-door" office policy.
- Demonstrate/model attitudes and behavior: Demonstrate respect by knowing and using workers' names; administrator and other leadership demonstrate good supervisory practices.
- Staff Value: Treat each employee as important to achieving facility mission.
- Job Descriptions: Specific, measurable job descriptions that can be used to conduct performance reviews of supervisory staff (e.g., use measures of quality and staff absenteeism and turnover to assess supervision).

#### 6. Team Approach

- Direct care staff involved in client care planning: Regular team meetings to discuss care plans that include all employees who provide direct client care.
- Shared responsibility for patient care and outcomes: Supervisors spend time with direct care staff in the field, learning about the issues of employees and clients; explicit job expectation includes collaboration and "one team" approach.
- Assignments: Consistent assignments to work teams to promote development of relationships among team members.
- Team building: Team building activities are regularly scheduled and mandatory. Regular events with whole team, with management and supervisory staff required to attend.
- Regular meetings: Regular meeting and communications to share information, including explicit communications plan and formal feedback loops.
- Problem Solving: Staff involvement in problem solving and decision making: Employee Advisory Committee; problem solving teams.

## 7. Staff Recognition and Support

- Multiple strategies to express appreciation and respect: Birthday celebrations, savings bonds for longevity, brag board for good deeds, employee of the month, staff appreciation events.
- Reward Service: Reward years of service with pay increases, gifts, and/or opportunities for advancement (e.g., mentoring, care specialization).
- “Personal touch”: Provide name tags, mail boxes, voice mail, introductions to others in agency, “welcome new staff” board with photos, personal signatures & presentations of gifts/awards.
- Fun at work initiatives: Staff committee to develop events/activities, celebrate holidays; drama club.
- Counseling resources: Employee Assistance Program; arrangement with local therapist for counseling, facility covers co-pay; child care benefits.



## **Recognition Process and Timelines**

The Gold Star award process operates on a two-year cycle. The award is granted by the Gold Star Council. The Council includes home health agency administrators, human resources directors and direct care staff. The Vermont Assembly of Home Health Agencies (VAHHA) and the Better Jobs Better Care program (BJBC) at the Coalition of Vermont Elders (COVE) are also represented on the Council.

Home health agencies seeking the award apply to the Council. To apply, the home health agency completes a self-assessment on use of the *Best Practices* and then develops a plan for implementing at least one new *Best Practice* in the coming year. The Council will review the applications. Applications may be accepted as is or accepted with modifications (for example, the home health agency may be asked to be more specific in its plan). After nine months of implementing the plan, the home health agencies participating in the program must document and submit to the Council their progress toward achieving the goals outlined in their plan. The Council reviews the documentation and determines whether to award Gold Star designation. The Gold Star Award remains in place through the next year.

Home health agencies are eligible for Gold Star awards whether or not they fully have achieved the goals outlined in their plan. The documentation of the results of their activities and the challenges they actually faced must explain why desired goals were, or were not, achieved. The lessons learned can provide the foundation for setting out new goals and work plan for the next cycle.

### **The Gold Star Program emphasizes the following:**

- Instituting *Best Practices* relies on a team approach to planning and implementation.
- New practices may or may not lead to complete achievement of desired goal(s). The important point is to understand, and document, what was done and why it did or did not work, whether or not the desired goal was achieved.
- This is an ongoing process. There is value in learning from attempts that did - and did not - work as a way to improve practices in the future.

Gold Star Award Time Line to be developed by VAHHA Gold Star Council and participating agencies.

<b>Date</b>	<b>Activity</b>
	Application Due
	Council Review/accept applications
	Implement Work Plan
	Project & Documents Due
	Council Reviews Project and Approves/Rejects
	VAHHA Awards Gold Star

## Application Instructions

### Overview of the Application Process

The Gold Star process depends on team effort. Discussion among team members is key to an accurate and useful self-assessment and plan. It is important to recognize that the different steps of the Gold Star process - **self-assessment, planning, and implementation of Best Practices** - are ongoing in nature and should reflect the individual character of your agency. Whatever way you choose, the first step in applying for a Gold Star award is to convene a team.

### **STEP 1** Convene a team:

Assign one person the role of team leader or chair. The team leader will run team meetings and help the team use the workbook and its tools. The team should include the following members:

- Home health agency leaders, such as the executive director, human resources director, business manager, and other upper level managers. The executive director should attend at least one meeting of the team to show his or her commitment to the team's results.
- Clinical and non-clinical staff members, including RNs, LNAs, PCAs, therapists, social workers, and support staff. While the Gold Star program may benefit all employees, the primary focus is on recruitment and retention of LNAs and PCAs. Therefore, LNAs and PCAs should have a strong presence and voice on the team.

### **STEP 2** Conduct a Self-Assessment:

The next step in completing a Gold Star application is to conduct a self-assessment. This workbook includes the self-assessment tool that you should use. The self-assessment tool helps you determine the degree to which your home health agency uses *Best Practices* for staff recruitment and retention. It will also help you choose a new *Best Practice* to pursue in the coming year. The self-assessment is to be used for internal purposes.

### **STEP 3** Develop Gold Star Plan:

This step requires that participating home health agencies develop a clear plan for implementing the new Best Practice.

For the Gold Star Plan you must select **one area of *Best Practice***. You may be initiating new practices in several areas; however, the application should address only one Best Practice category and within this category, select at least one specific practice that you will begin.

The application package contains planning charts that will help you outline your goals, develop a specific work plan to achieved your goals, identify methods for documentation, and clarify timelines for completing each activity.

## **STEP 4** Complete Application Cover Sheet:

To apply for the Gold Star award, you must submit the completed planning charts along with the application cover sheet to the Council.

Applications may be submitted to the Gold Star Council at any time.

## **STEP 5** Submit Documentation to Gold Star Council:

These forms will outline documentation of your approaches and the degree to which goals were achieved. In a normal Gold Star cycle, you will submit the documentation forms in January of the second year. The Gold Star Council will determine which agencies receive the Gold Star Award for the coming two years by March.

## **Gold Star Application Kit**

**The Application Kit consists of the following:**

- **Application Cover Sheet**
- **Self-Assessment Instructions and Tool**
- **Planning Charts**

## **Gold Star Application Cover Sheet**

Include this cover sheet in your application to the Gold Star Council. Attach a copy of the Goal Chart, Work Planning Chart, Challenges and Needed Assistance Form.

Name of Home Health Agency: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email address: \_\_\_\_\_

Best Practice areas we will pursue:

\_\_\_\_\_

Members of our Assessment and Planning Team(s):

Name	Position	Assessment Team member	Planning Team member

Return appropriate forms either by e-mail to: [vahha@comcast.net](mailto:vahha@comcast.net)  
or mail completed application to:

**Vermont Assembly of Home Health Agencies  
10 Main Street  
Montpelier, VT 05602**

## **Self-Assessment Tool**

## **Instructions**

The Best Practice Team uses the Self-Assessment Tool to:

### 1. **Rate your Home Health Agency on Best Practices:**

This self-assessment tool asks several questions about your agency's current practices in each of the seven Best Practice categories.

For each question, the team should rate your agency on a scale of 1 (strongly disagree) to 4 (strongly agree). The team can do this in one of several ways. For example:

- The team could come together as a group, read the questions together, discuss each question as a group and agree on one rating for each question as a group. This decision could be either by consensus or vote.

Or

- Each team member could take a copy of the tool and rate each question by him/herself. Then the team could come together to discuss each individual's rating and agree on a final rating.

Or

- Team members could rate each question individually and then come together, and calculate an average score for each item.

Or

- The team could develop another way that works well for your agency.

### 2. **Select Best Practices to Pursue:**

The final step in conducting the self-assessment requires that the team decides which practices in each category are top priorities for your home health agency to pursue. At the end of each category's rating sheet you will find a set of questions. These should help create a discussion that leads your team to select a practice for this category.

Once again, teams can choose the approach that works best for choosing the Best Practice(s) they want to pursue. They might:

- Decide on Best Practice priorities through team discussion of each question.

Or

- Individually answer prioritization questions and then share results with team.

Or

- Individually answer prioritization questions, tally scores of all the members and Best Practices based on the tally.

Or

- Develop another way that works well for your home health agency.

## Staff Recruitment

Staff Recruitment Practices	Strongly Disagree		Strongly Agree		Don't Know
	1	2	3	4	
<i>A. Community outreach &amp; involvement:</i>					
1. We use many different ways to reach new employees.					
2. We have relationships with community-based organizations.					
3. We have partnerships with schools or other organizations to introduce career options.					
<i>B. Collaboration with other agencies:</i>					
1. We strategize with other organizations about ways to increase the work force (e.g., mutual referrals, sponsor career fairs and community education).					
2. We contract with hospitals, and non-medical home care providers to use their staff.					
<i>C. Screen for successful employees.</i>					
1. We have a picture of the ideal new hire based on the qualities (knowledge, skills, and traits) of employees we know tend to remain on the job.					
2. We schedule interviews in two parts so that candidates are asked to return for a second interview.					
3. We use a standard set of interview questions to gather information about the applicant's skills and values.					
<i>D. Honest description of job duties and expectations.</i>					
1. We have clear expectations and accurate job descriptions, especially for high turnover positions.					
2. We use realistic job previews to give possible new staff a correct idea of the job.					
3. We give new staff realistic information about stresses of the job.					
4. We give candidates an opportunity to ask questions of present employees about the job.					
5. Candidates have an opportunity to complete a pre-employment job shadowing before we offer employment.					
<i>E. Involve direct care workers in recruitment, interviewing.</i>					
1. We have an effective employee referral bonus system.					
2. Employees know how to recruit and refer people that we might hire.					
3. We involve direct care workers in creating the outline of an ideal new employee.					
4. Direct care workers are part of the interview process.					
<i>F. Other staff recruitment practices we use or would like to use (describe – use separate sheet if necessary):</i>					

### Selecting Staff Recruitment Practices:

Look back at your scores for Staff Recruitment Practices. Items with scores of 1 or 2 should be considered first for your Gold Star Plan. Mark these items (use a highlighter or other mark).

To help you choose at least one item to include in your Gold Star Plan, answer these questions for each item you have marked. The top priority should go to the item with the most “yes” responses.

Practice 1: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 2: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 3: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

We have selected the following Staff Recruitment Practice(s) to address in our Gold Star Plan:

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## Orientation

Orientation Practices	Strongly Disagree		Strongly Agree		Don't Know
	1	2	3	4	
<i>A. Standardized orientation</i>					
1. All new staff goes through the same orientation that covers information needed to understand all parts of the organization.					
<i>B. Regular follow-up with new staff</i>					
1. We schedule 4 to 6 meetings with new employees and their supervisors during first three months of employment.					
2. We conduct post-hiring evaluations on the interview, hiring, and orientation process.					
<i>C. Hands-on training specific to required tasks &amp; responsibilities</i>					
1. New staff "shadow" experienced staff to be prepared for the job.					
2. Before new staff members in all positions (e.g., LNA, PCA, RN, etc.) are working on their own, we develop and implement a plan to ensure appropriate level of competencies.					
<i>D. Mentoring and support for new staff</i>					
1. New staff members are paired with a mentor or long-term employee to provide ongoing support and information					
2. We carefully select and match mentors with new staff members.					
<i>E. Other orientation &amp; training practices we use or would like to use</i> (describe):					

**Selecting Orientation Practices:**

Look back at your scores for Orientation Practices. Items with scores of 1 or 2 should be considered first for your Gold Star Plan. Mark these items (use a highlighter or other mark).

To help you choose at least one item to include in your Gold Star Plan, answer these questions for each item you have marked. The top priority should go to the item with the most “yes” responses.

Practice 1: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 2: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 3: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

We have selected the following Orientation Practice(s) to address in our Gold Star Plan:

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**Staffing Levels and Work Hours**

Staffing Levels and Work Hours Practices	Strongly Disagree		Strongly Agree		Don't Know
	1	2	3	4	
<i>A. Stable, reliable hours</i>					
1. At least quarterly, we review staff hours to assess our ability to provide stable and reliable work hours.					
<i>B. Flexible scheduling</i>					
1. We work with staff to create schedules that work best for them and address clients' needs.					
2. We gather staff member input to assign work and hours for each staff member.					
<i>C. Overtime is not coercive, not pressured or frequently requested</i>					
1. We track overtime hours, looking at patterns to see if there are problem areas.					
2. We work to keep a low number of overtime hours					
<i>D. Safe work assignments</i>					
1. We figure out staffing levels needed to provide high quality of care and maintain staff safety.					
<i>E. Other staffing level &amp; work hours practices we use or would like to use</i> (describe):					

## Selecting Staffing Levels and Working Hours Practices:

Look back at your scores for Staffing Levels and Working Hours Practices. Items with scores of 1 or 2 should be considered first for your Gold Star Plan. Mark these items (use a highlighter or other mark).

To help you choose at least one item to include in your Gold Star Plan, answer these questions for each item you have marked. The top priority should go to the item with the most “yes” responses.

Practice 1: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 2: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 3: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

We have selected the following Staffing Levels and Working Hours practice(s) to address in our Gold Star Plan:

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**Professional Development and Advancement Practices**

Professional Development & Advancement Practices	Strongly Disagree		Strongly Agree		Don't Know
	1	2	3	4	
<i>A. Career lattices</i>					
1. We raise wages and add responsibilities for staff through promotions within job categories (e.g., advanced certification or other job growth opportunities).					
2. We have programs for all staff positions that include training in mentoring, coaching and leadership skills.					
<i>B. Cross disciplinary training</i>					
1. We have training that helps staff build skills for different programs, enabling workers to float across programs within our agency.					
<i>C. Mentoring programs</i>					
1. We have a mentor program that includes training for experienced staff to learn mentoring skills.					
2. We match trained mentors with newer employees.					
3. Mentors are peers who are trained for skills in active listening, leadership, conflict resolution, and providing feedback.					
4. The mentoring system is evaluated and changed as needed.					
<i>D. Training in specialized care</i>					
1. We provide opportunities for staff to learn specialized care.					
<i>E. Ongoing training opportunities on site or through financial support</i>					
1. Staff are encouraged and supported in obtaining additional training and education.					
2. We provide tuition assistance for college or technical school courses.					
3. We provide in-house continuing education for staff members to meet licensing requirements.					
<i>F. Other practices we use or would like to use (describe):</i>					

## Selecting Professional Development and Advancement Practices:

Look back at your scores for Professional Development and Advancement Practices. Items with scores of 1 or 2 should be considered first for your Gold Star Plan. Mark these items (use a highlighter or other mark).

To help you choose at least one item to include in your Gold Star Plan, answer these questions for each item you have marked. The top priority should go to the item with the most “yes” responses.

Practice 1: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 2: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 3: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

We have selected the following Professional Development and Advancement Practice(s) to address in our Gold Star Plan:

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**Supervision: Training and Practices**

Supervision: Training & Practices	Strongly Disagree		Strongly Agree		Don't Know
	1	2	3	4	
<i>A. Training for all supervisory staff</i>					
1. Supervisory staff receive training and feedback in all the following areas					
a. Communication skills (active listening & conflict resolution)					
b. Staff management skills					
c. Time and resource management					
2. We use a variety of ways to train current and potential supervisors, including onsite seminars and tuition to off site training programs.					
<i>B. Provide supervisory staff with tools needed to succeed</i>					
1. We provide staff with enough time to mentor direct care workers.					
2. We provide supervisory staff with sufficient time to coach direct care workers.					
3. Administrators in our organization support management decisions.					
<i>C. Accessible management and supervisory staff</i>					
1. All agency managers and supervisors have an “open door” policy, meaning that the office door really remains open.					
2. Direct care staff can easily talk to program managers and supervisory staff.					
<i>D. Demonstrate/model attitudes and behavior</i>					
1. Leaders of our agency have good communication skills and support development of those skills in others.					
2. Supervisory staff use and support good coping skills.					
1. Supervisory staff know and use employees’ names.					
2. Supervisory staff wear nametags.					
<i>E. Treat each worker as important to achieving agency mission</i>					
1. Employees understand that they are valuable and useful to the organization					
<i>F. Specific, measurable job descriptions used to conduct performance reviews of supervisory staff</i>					
1. We evaluate supervisors’ skills by assessing them, reviewing records, and getting feedback from clients and families, their peers and direct caregivers.					
2. We look at the performance of supervisors by using measures of service quality and staff absenteeism and/or turnover rates.					
<i>G. Other practices supervision and training practices we use or would like to use (describe):</i>					

## Selecting Supervision Practices:

Look back at your scores for Supervision Practices. Items with scores of 1 or 2 should be considered first for your Gold Star Plan. Mark these items (use a highlighter or other mark).

To help you choose at least one item to include in your Gold Star Plan, answer these questions for each item you have marked. The top priority should go to the item with the most “yes” responses.

Practice 1: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 2: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 3: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

We have selected the following Supervision practice(s) to address in our Gold Star Plan:

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## Team Approach

Team Approach Practices	Strongly Disagree		Strongly Agree		Don't Know
	1	2	3	4	
<i>A. Direct care worker involved in patient care planning</i>					
1. Direct care staff is always part of patient care planning.					
<i>B. Shared responsibility for patient care and outcomes</i>					
1. Job descriptions indicate that employees will help one another and work with a “one team” approach.					
2. Supervisors spend time with direct support staff to better understand issues of clients and staff.					
3. Supervisory staff work with direct care staff in the field to get the job done, as needed.					
<i>C. Consistent assignments</i>					
1. Employees are consistently assigned to work with clients or work teams, as appropriate.					
<i>D. Regular, mandatory team building activities</i>					
1. “Maintaining a positive working relationship with co-workers” is included in all job descriptions and is a clear expectation of all staff.					
2. We have a policy that spells out expected and acceptable staff behavior.					
3. We conduct regular events to help teams work together.					
<i>E. Regular meetings and communications to share information</i>					
1. We have an agency-wide communication plan to guide the exchange of information and ideas.					
2. The communication plan addresses:					
a. Management and board decisions					
b. Opportunities for advancement					
c. Cost of benefits					
d. Quality improvement plans					
e. Progress on agency action plans					
f. Client and employee satisfaction data					
3. We have a formal feedback loop so employees have a means for providing input into agency decisions, policies, and practices.					
<i>F. Staff involvement in problem solving and decision making</i>					
1. Direct support staff are part of every committee in our agency.					
2. We use teams to solve problems and create suggestions.					
<i>G. Other team approach practices we use or would like to use (describe):</i>					

### Selecting Team Approach Practices:

Look back at your scores for Team Approach Practices. Items with scores of 1 or 2 should be considered first for your Gold Star Plan. Mark these items (use a highlighter or other mark).

To help you choose at least one item to include in your Gold Star Plan, answer these questions for each item you have marked. The top priority should go to the item with the most “yes” responses.

Practice 1: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 2: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 3: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

We have selected the following Team Approach Practice(s) to address in our Gold Star Plan:

---

## Staff Recognition and Support

Staff recognition and support practices	Strongly Disagree		Strongly Agree		Don't Know
	1	2	3	4	
<i>A. Strategies to express appreciation and respect</i>					
1. Staff often gets positive feedback from many different people. Feedback is immediate, earned, specific and personal.					
2. We have many ways to thank staff for excellent work (e.g., bonuses, plaques, certificates, gifts, etc.)					
3. We use a variety of ways to express appreciation for staff (e.g., staff appreciation events, birthday celebrations, brag boards).					
<i>B. Reward years of service</i>					
1. At specific times of employment (for example, 1, 2, 5, 10 years), we give staff members recognition, gifts or bonuses.					
<i>C. "Personal Touch"</i>					
1. We use many different ways to recognize the individual in each staff member (e.g., staff profiles in agency newsletter).					
<i>D. Fun at Work initiatives</i>					
1. We have a committee to develop and organize events and activities for staff.					
2. We have specific traditions that add a touch of humor to our work days (e.g., costumes at Halloween).					
<i>E. Counseling resources</i>					
1. We have an employee assistance program to support staff in finding counseling services, self-help groups, childcare, financial counseling					
2. We provide general support in small groups or one-to-one.					
3. We provide child care or benefits to help employees pay for child care.					
<i>F. Other practices</i> (describe):					

## Selecting Staff Recognition and Support Practices:

Look back at your scores for Staff Recognition and Support Practices. Items with scores of 1 or 2 should be considered first for your Gold Star Plan. Mark these items (use a highlighter or other mark).

To help you choose at least one item to include in your Gold Star Plan, answer these questions for each item you have marked. The top priority should go to the item with the most “yes” responses.

Practice 1: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 2: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

Practice 3: \_\_\_\_\_

Are we interested in using this practice?	Yes	No
Are there models of this practice easily available?	Yes	No
Is this a practice that would be easy to implement now?	Yes	No
Would we be able to implement this practice without too much cost?	Yes	No
Would use of this practice provide enough benefit to be worth the effort?	Yes	No

We have selected the following Staff Recognition and Support Practice(s) to address in our Gold Star Plan:

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## **Gold Star Plan**

## Planning

### Introduction

The Best Practices Plan must be filled out and submitted to the Gold Star Council in order to be accepted into the Gold Star program. The Best Practices Plan consists of three forms:

- Goal Chart
- Work Planning Chart
- Challenges and Assistance Form

The Gold Star Team will fill out a set of planning forms for the specific Best Practice that you've decided to develop. Once completed, the team should submit the plan to the Gold Star Council.

The completed plan should also serve as the roadmap to developing and implementing the new Best Practice you've chosen. It is set up to help your planning team become specific and realistic about the goals you want to achieve, the activities needed to reach your goals, the challenges you may face along the way, and the help you'll need to put the plan in place.

### Instructions

1. Identify one Best Practice that you will develop in this cycle.
2. Identify who in your agency needs to be involved in developing and implementing the Best Practice.
3. Bring together a planning team and have them become familiar with the charts and form (they can do this as a group or individually). This may be the same team than completed the self-assessment, with new members to insure all needed representation is present.
4. The team first completes the **Goal Chart**. Instructions are at the top of each column. Make additional copies of charts and form as needed. Keep in mind that goals and measures are most effective when they reflect efforts toward continuous improvement, achieved through incremental development.
5. Next, the team fills out the **Work Planning Chart**. Begin by deciding what steps you will need to achieve your goals. Be as specific as possible. The more detailed and thoughtful you are at this stage, the easier it will be for you to complete this work and implement your chosen Best Practice.
6. Identify whom in your agency should be involved in each step – and designate the one person (with an \*) who will be responsible for making sure that step happens.
7. List the ways in which you will demonstrate that each step was accomplished.

8. Identify a completion date for each step.
9. Fill out the **Challenges and Needed Assistance Form**. The team should discuss challenges they may face in developing the Best Practice. This is an opportunity for people to voice their concerns and think as a group about how to address the challenges. The team can then identify “outside” assistance they believe is needed to achieve the goals of this plan. Do they need training that is specific to the goals? Would they like to see examples of the work that other agencies have successfully implemented? Would they like the names and contact information for staff in other home health agencies who have worked on this goal? The Gold Star Council will be responsible for helping agencies in the Gold Star Program receive the assistance they need to be successful in their efforts.
10. To document completion of the self-assessment process, complete the **Self-Assessment Process Form** and submit this with your application.
11. Finally, complete the **Gold Star Application Cover Sheet** and attach it to the front of the Planning Application.

### **Planning Examples**

To help you develop a plan, the Gold Star Council has created examples of plans for some of the Best Practices categories. These examples are in Appendix I. Each agency is strongly encouraged to develop steps that work best for that organization. There is no expectation that your plan should look just like any of these examples.

## Goal Chart

Best Practice Category \_\_\_\_\_

Best Practice \_\_\_\_\_

<b>Goals</b> <i>Instructions – List each goal separately that your agency expects to achieve as a result of implementing this practice.</i>	<b>How will you demonstrate that you met your goals?</b> <i>Instructions – describe how your agency will demonstrate that it was successful in meeting each goal (provide a separate description for each goal)</i>

### Work Planning Chart

<p><b>Steps needed to establish the following Best Practice _____</b></p> <p><i>List each step or activity that the team has identified as needed. Be as specific and concrete as possible.</i></p>	<p><i>Identify all those who will be involved in each step. Identify one person who will be responsible for making this happen with an *</i></p>	<p><i>Specify how you will demonstrate that each step was accomplished.</i></p>	<p><i>Identify a realistic completion date for each step.</i></p>

## **Challenges and Assistance Form To Successfully Achieve our Goals**

*Instructions: Please be as open and thoughtful as possible in answering the following three questions. The purpose of this section is to give you the opportunity to identify and plan for challenges to your work plan, and to identify any outside support or training you may need to implement your plan and reach your goals.*

**Describe the challenges or barriers you might face in implementing this practice.**

**Describe your plans for addressing the challenges described above.**

**What external assistance is needed for your agency to implement this practice (e.g., training, technical assistance, resources, other)?**

## Self-Assessment Process Form

Please complete the following items to describe the process your agency used to conduct the self-assessment:

1. Describe the persons involved in the self-assessment process (list staff position and number of staff members in each position that participated).
2. Describe the process you used to conduct the self-assessment (e.g., team gathered and reviewed the self-assessment tool together, coming to consensus on each rating scale).
3. How many times did the team meet to complete the self-assessment?
4. Estimate the number of staff hours that were required to complete the self-assessment.
5. Is there anything else you would like to add about your agency's self-assessment process?

## **Documentation**

## Documentation

### Instructions

The Gold Star Council has identified two types of documentation that participating home health agencies are asked to provide. These are:

- Documentation of the steps taken and achievement of goals outlined in the Gold Star plan.
- Agency data to be used for tracking system-wide outcomes

The Gold Star Council will inform applicants in each cycle of the specific due date for documentation.

Documentation of work plan implementation - Throughout the year, you will document the implementation of steps and the achievement of goals. At the end of the Gold Star cycle, you will present this documentation to the Council for its review.

To present your documentation, use the following forms. These forms help you to outline your original plans and the degree to which those plans were realized. Additionally, they allow you to demonstrate how your current work and accomplishments will impact plans to develop new Best Practices for the coming year. Please feel free to add any additional documents you feel would help explain your work and progress.

System-wide outcome information – The implementation of Best Practices in Vermont’s home health agencies is expected, over time, to have a positive impact on the work culture within individual agencies and throughout Vermont’s home health profession. The Gold Star Council would like to track the impact of instituting Best Practices on the following outcomes:

1. Employee satisfaction
2. Turnover rates
3. Staff position vacancy rates
4. Years of service
5. Quality of Care
6. Patient/client satisfaction

In order to do this, agencies will track these outcomes through standardized formula, including those already in use. *The data reported to the Council will be kept strictly confidential.* The Council will use the information in aggregate to track system-wide outcomes.

Forms, along with specific standardized formula for each outcome, follow. Complete these forms and submit along with the documentation of work plan implementation.

**Goal Chart -- Documentation**

**Best Practice Category:**

**Best Practice:**

<p><b><u>Goals :</u></b></p> <p><i>Instructions: In the column below, list all the goals your agency expected to achieve as a result of implementing this practice.</i></p>	<p><b>How did you demonstrate that you met your goals?</b></p> <p><i>Instructions: In the column below, provide a description for <u>each goal</u> of how your agency planned to demonstrate that it was successful in implementing each goal.</i></p>	<p><b>Goals Achieved</b></p> <p><i>In this column document for each goal, if it was achieved. Also document any unanticipated outcomes, both positive and negative, that resulted from this plan.</i></p>

### Work Planning Chart – Documentation

Steps Identified	Steps actually taken	Person who were to be included; one person responsible	Persons actually involved	How you expected to demonstrate that <u>this step was accomplished?</u>	How did you demonstrate this was accomplished	Completion date for each step	Actual completion date

## Challenges and Assistance -- Documentation Form

*Please answer the following questions:*

**Describe the actual challenges or barriers you faced in implementing this practice. Which of these were anticipated when you developed your plan? Which, if any, were unexpected?**

**Describe how you addressed the challenges you faced.**

**What external assistance did you actually access and use to implement this practice (e.g., training, technical assistance, resources, other)? Who provided this assistance? How satisfied were you with the assistance?**

## System-wide Outcomes Tracking Form

### Employee Satisfaction:

1. Source of employee satisfaction information:
2. Have there been changes in overall employee satisfaction over the course of the *Gold Star* cycle? Describe.
3. Describe changes in levels of employee satisfaction for each of the seven Best Practice areas:
  - a. Staff recruitment
  - b. Orientation and training
  - c. Staffing levels and work hours
  - d. Professional development and advancement
  - e. Supervision: Training and practices
  - f. Team approaches
  - g. Staff recognition and support

### Turnover Rate

Number of separations during past quarter  
Number of employees on last day of quarter      X      100

### Vacancy Rate

Number of vacant positions during past quarter  
Total number of positions on last day of quarter      X      100

**Time of Service**

1. Calculate the rates for 1, 5, 10, and 20 or more years of service as follows:

<b>A.</b> Total number of employees with <b>ONE-FOUR</b> years of service	<b>B.</b> Total number of employees as of December 1	$\frac{A}{B} \times 100$	<b>One Year of Service Rate</b>

<b>A.</b> Total number of employees with <b>FIVE-TEN</b> years of service	<b>B.</b> Total number of employees as of December 1	$\frac{A}{B} \times 100$	<b>Five Years of Service Rate</b>

<b>A.</b> Total number of employees with <b>TEN-NINETEEN</b> years of service	<b>B.</b> Total number of employees as of December 1	$\frac{A}{B} \times 100$	<b>Ten Years of Service Rate</b>

<b>A.</b> Total number of employees with <b>TWENTY OR MORE</b> years of service	<b>B.</b> Total number of employees as of December 1	$\frac{A}{B} \times 100$	<b>Twenty Years of Service Rate</b>

2. Calculate the number of staff who left employment prior to 3 and 6 months of service in the past year.

<b>A.</b> Total number of employees that left with less than 3 months of service	<b>B.</b> Total number of employees as of December 1	$\frac{A}{B} \times 100$	<b>Less than 3 months of service rate</b>

<b>A.</b> Total number of employees that left with 3 to 6 months of service	<b>B.</b> Total number of employees as of December 1	$\frac{A}{B} \times 100$	<b>3 to 6 months of service rate</b>

## Quality of Care

1. Source of information is Home Health Compare.
2. Have there been changes in overall quality of care outcomes over the course of the *Gold Star* cycle? Describe.
3. Describe changes in levels of quality of care for each of the eleven outcomes measured:
  - a. Improvement in Ambulation
  - b. Improvement in Transfer
  - c. Improvement in Pain Interfering with Activity
  - d. Improvement in Urinary Incontinence
  - e. Improvement in Management of Oral Meds
  - f. Improvement in Bathing
  - g. Improvement in Dyspnea
  - h. Discharge to the Community
  - i. Emergent Care Provided
  - j. Improvement in Surgical Wounds

## **Patient/Client Satisfaction**

1. Source of patient/client satisfaction information:
2. Have there been changes in overall patient/client satisfaction over the course of the *Gold Star* cycle? Describe.
3. Describe changes in outcomes of patient/client satisfaction for each of the following areas:
  - a. Arranging Home Health Care (HHC)
  - b. Dealing with HHC Office
  - c. Nurses
  - d. Home Health Aides
  - e. Therapists
  - f. Final Ratings
  - g. Overall Ratings

## Documentation Cover Sheet

Use the following cover sheet when submitting documentation to the *Gold Star* Council.

Name of Agency: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email address: \_\_\_\_\_

Best Practice Areas we planned to pursue in the past *Gold Star* annual cycle:

\_\_\_\_\_

Summary of changes that we made in our *Gold Star* Plan:

Summary of our accomplishments in this *Gold Star* cycle:

Summary of challenges we faced in this cycle:

Description of how current work and accomplishments will impact plans for developing new Best Practices in the coming year.

## **Quality of Care**

## **Patient/Client Satisfaction**



## **Contact Information**

If you need help with the Gold Star application, or if you would like more information, please contact:

Peter Cobb  
VAHHA  
Tel. 802-229-0579  
e-mail: vahha@comcast.net

Question about process or content

Steve Savoy  
CVHHH  
Tel. 224-2265

## **Appendices**

## **Appendix I**

### **Example of Best Practice Work Plan**

**Goal Chart (example)**

Best Practice Category: *Professional Development and Advancement*

Best Practice: *Staff are encouraged and supported in obtaining additional training & education.*

<p><b><u>Goals :</u></b></p> <p><i>Instructions: List each goal separately that your agency expects to achieve as a result of implementing this practice.</i></p>	<p><b>How will you demonstrate that you met your goals?</b></p> <p><i>Instructions: describe how your agency will demonstrate that it was successful in meeting each goal (provide a separate description for each goal)</i></p>
<p>Staff are encouraged and supporting in obtaining additional training and education</p>	<p>The number of staff who are participating in educational programs will increase from one in 2007 to 3 or more in 2008.</p>

**Work Planning Chart (example)**

<p><b>Steps needed to establish the following Best Practice:</b>  <i>Staff are encouraged and supported in obtaining additional training and education</i>  <u>List each step or activity that the team has identified as needed. Be as specific and concrete as possible.</u></p>	<p><i>Identify all those who will be involved in each step. Identify the one person who will assume responsibility with *.</i></p>	<p><i>Specify how will you demonstrate that each step was accomplished.</i></p>	<p><i>Identify a realistic completion date for each step.</i></p>
<p>#1 – Information regarding LNA, LPN and RN programs will be available on a special bulletin board in the staff lounge.</p>	<p>Secretary and maintenance personal will purchase and install new bulletin board. HR director will post and update educational materials and financial aid information.</p>	<p>Education Bulletin board in place</p>	<p>7/30/07</p>
<p>#2 – Scholarship fund is established for employees with “memorial” funds.</p>	<p>Director establishes and announces a scholarship fund and actively solicits “memorial” donations.</p>	<p>Scholarship account opened and funding to support one course for 4 students is available</p>	<p>9/15/07</p>
<p>#3”Back to School” celebration and gifts for all enrolled employees</p>	<p>Activities director and HR committee</p>	<p>“Back to School” party is photographed and written up in newsletter.</p>	<p>10/1/08</p>

## **Challenges and Assistance Needed to Successfully Achieve our Goals (example)**

*Instructions: Please be as open and thoughtful as possible in answering the following three questions. The purpose of this section is to give you the opportunity to identify and plan for challenges to your work plan, and to identify any outside support you may need to implement your plan and reach your goals.*

### **Describe the challenges or barriers you might face in implementing this practice.**

2) Inadequate funds for “memorial” donations to support the number of scholarships requested.

### **Describe your plans for addressing the challenges you’ve described above.**

2) Research other scholarship options for our employees

### **What external assistance is needed for your home health agency to implement this practice (e.g., training, technical assistance, resources, other)?**

We would like examples of successful implementation of similar programs in other agencies.

## **Appendix II**

### **Application Review Process**

## **Gold Star Application Review Process**

### **Overview:**

The Gold Star Council is responsible for application and documentation review leading to the designation of home health agencies as Gold Star facilities.

The Council's decision making process will be guided by the use of a standardized scoring instrument. The purpose of this instrument is to insure that all applications are judged and scored by the same criteria.

The scoring instrument will guide the Council in making one of three possible decisions on a home health agency's application:

- Accepted as is
- Accepted with clarifications
- Application not complete

All home health agencies expressing interest in the Gold Star program will be given the opportunity to complete acceptable applications. Home health agencies will have 30 days to respond to requests for clarification or further information. If agencies require further time to respond, they will be encouraged to apply in the next Gold Star cycle.

The Council makes final decisions and will take responsibility for identifying technical assistance needs and request assistance to meet those needs, including assistance to complete acceptable applications, from appropriate agencies (e.g., DAIL, VAHHA, BJBC-COVE).

### **Review Process – Use of Application Criteria Score Sheet**

The purpose of ranking/scoring each application on a set of specific criteria is to provide consistency and a level of objectivity for every applicant that comes to the Gold Star Council. It is important that applicants and Council members have a common understanding of what is being judged and how it is being judged on the application plans. Given that the review process will involve different teams, these criteria and decision making guidelines are intended to insure as much fairness and equity in the decision making process as possible.

The Council, in reviewing applications, completes one Application Criteria Score Sheet for each Best Practice identified in the application. The following instructions outline the process to be used by the Council.

Each Council member adds up the scores on his/her ranking sheet to get a “total score” at the bottom of the sample ranking form on page 3.

The Council members compare their rankings and comments. The object of this activity is to arrive at a consensus score. The Council may choose to do this through discussion – in the event that consensus can’t be reached on each score, the Council may decide to use the mean score for individual criteria when discussion doesn’t achieve consensus.

The Council uses the score ranges below to make their final decision. Therefore, if an application’s total score falls between:

<b>0 - 11</b>	<b><i>the Application is Not Complete</i></b>
<b>12 - 24</b>	<b><i>the Application requires Clarification</i></b>
<b>25 - 40</b>	<b><i>the Application is Accepted.</i></b>

For applications receiving scores under 25, the Council clearly articulates, in writing, the clarifications the applicant should make and informs home health agencies if their applications were accepted (scores from 25 - 40), requiring clarification (scores 12 – 24) or need completion (scores 0 - 11). Home health agencies with accepted applications can begin implementation of their plan upon receiving notification.

For applications with scores of 12 - 24 (accepted with clarifications), the Gold Star Council will notify the applicant of the decision and requested revisions. The applicant will be given up to 30 days from receipt of the decision to address the requests and return them to the Council for final acceptance. These agencies will be offered technical assistance to help with requested clarifications.

Home health agencies with applications scoring 0 – 11 (incomplete), will receive a clear outline from the Council on areas of the application requiring further details. They will be encouraged to re-apply in the next Gold Star Cycle if a 30 day response is unrealistic. They will also be offered technical assistance to aid in the completion of their applications.

**SAMPLE FOR APPLICANT'S INFORMATION ONLY:  
DO NOT INCLUDE IN GOLD STAR APPLICATION**

**Gold Star Council  
Application Criteria Score Sheet**

*Instructions:*

1) *Each member of the Council involved in reviewing an application should read the application and evaluate each component of the plan listed below with a score from 0 to 2 where:*

- 0 = Not complete*
- 1 = Accepted with clarifications*
- 2 = Accepted*

2) *Use the comments section to note concerns, explain scores, etc.*

3) *At the end of this form, add up all the scores recorded in the right column to calculate the total score.*

Best Practice Category: \_\_\_\_\_

Best Practice: \_\_\_\_\_

	<i>Not complete</i>	<i>Accepted w/clarifications</i>	<i>Accepted</i>
<b>1) GOALS</b>			
a) The goals of this plan are:			
Clearly described	0	1	2
b) Methods for demonstrating goals were met are:			
Clearly described	0	1	2
Specific as to expected result	0	1	2
Based on results that are Observable or measurable	0	1	2
Totals	_____	_____	_____ = _____

Comment \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

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	<i>Not complete</i>	<i>Accepted w/clarifications</i>	<i>Accepted</i>
<b>2) WORK PLAN</b>			
a) The steps outlined:			
Are logical & appropriate	0	1	2
Are adequately detailed	0	1	2
Demonstrate an understanding of what is needed	0	1	2
b) Identification of participants:			
Includes job titles	0	1	2
Includes person responsible by job title	0	1	2
Demonstrates the necessary staff are involved	0	1	2
c) Methods for demonstrating that each step was accomplished are:			
Clearly described	0	1	2
Accurate reflection that the step happened	0	1	2
Specific	0	1	2
d) The time plan for completing activities is:			
Clearly described	0	1	2
Realistic in terms of the time steps should take	0	1	2
Logical in the order of steps	0	1	2
<b>Work Plan Totals</b>	_____	_____	_____ = _____

Comment \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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	<i>Not complete</i>	<i>Accepted w/clarifications</i>	<i>Accepted</i>
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**3) CHALLENGES AND  
NEEDED ASSISTANCE**

a) The description of anticipated challenges is:

Clearly described	0	1	2
Realistic	0	1	2

b) The plan to address challenges:

Is clearly described	0	1	2
Specifically addresses the challenges	0	1	2

**Challenges & Assistance Totals**                      \_\_\_\_\_    \_\_\_\_\_    \_\_\_\_\_ = \_\_\_\_\_

Comment \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_