



Site Survey Process, Timelines and Conversations



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CET Site Survey



- Creating Excellence Together (CET) Standards are measured through on-site visits with the service provider
- The visit is called a survey



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Who Conducts Surveys?



- ACDS carefully selects its surveyors from people who have experience in the field of community disability services



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Day 1



- Organizational Framework Meeting I (duration: 3 hrs)
 - Service provider showcase (30 minutes)
 - Give the team a tour of the organization
 - Give an overview of the organization, the services offered and the clientele
 - Invite individuals, families and guardians to discuss the organization
 - Highlight accomplishments over the last three years
 - Discuss issues, trends and innovations
- Break (this would be a natural time for the individuals, staff and families to exit)

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- CET team question period (2 – 2½ hours)
 - The survey team asks the service provider to clarify questions from the Self-Study Guide
 - The survey team asks additional questions that may not have been answered by the first two-hour session
 - The service provider comments on any final pieces of information that it feels are critical to the discuss with the survey team
 - The survey itinerary is reviewed and confirmed

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- Organizational Framework Meeting II (where applicable) (duration: 1 hour)
 - If the organization has a Board of Directors, Organizational Framework Meeting II must be attended by the board treasurer and at least one other board member
 - If the organization does not have a Board of Directors, an interview will be scheduled with the organization's internal accountant or bookkeeper

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• Participant Conversations

(duration: 3 hours per participant)

- Participant Conversations take place between the surveyors, the primary participants and those people identified on their *Social and Service Maps*.
- A *conversation set* is made up of private conversations with each person taking part based on an agreed upon start time

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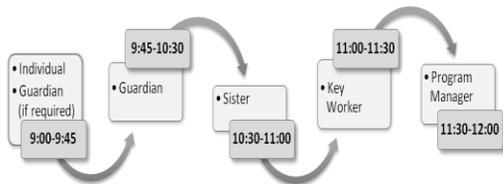
Reliability Check



- The first conversation with the survey team (all surveyors)
- Its purpose is to be quality control for the survey team to ensure that both are hearing, understanding and rating the indicators the same, based on the information shared in the conversation



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Day 2



- Participant Conversations continue
- File and Documentation Review
 - The survey team
 - Reviews and rates their survey conversations
 - Documents their observations and
 - Reviews any files or documentation they have requested to see on-site

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- Additional Conversations
 - Throughout the three-day survey, the team leader
 - May request additional information
 - Or ask to speak to the appropriate people (e.g., human resources, behaviour specialist, additional staff for a proper cross section of positions) to clarify questions that arise during the survey

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Day 3



- Exit Conference (duration: 1 to 2 hours)
 - The survey team leader will request any outstanding, missing information
 - The team leader gives the Chief Executive Officer and other attending members an overview of the survey team's time spent on-site and explains the post-survey process
 - General observations and highlights of the survey may be discussed on a general basis
 - The survey team cannot give the organization an overall outcome of the survey because this is not determined until after a summary report has been submitted to ACDS

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Collecting Information



- Conversations
 - Individuals Receiving Service
 - Parents/Guardians
 - Staff
 - Management
- File reviews
- Documentation reviews
- Policy Reviews
- Observations

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An Overview of Conversations



- With individuals receiving service
 - The goal is to have individuals reflect on their quality of life
 - Questions will focus on the services that they receive

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- With guardians and/or family
 - Guardians or family members may be asked questions that individuals were not able to give surveyors enough information for
 - Questions will focus on the services that their loved ones are receiving

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- With staff who support the individuals
 - Regarding the specific care of the individuals
 - Regarding general organizational information
 - Specific to
 - The Quality of Service for the individuals supported
 - Behaviours of Concern
 - Human Resources

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- With management
 - Regarding general organizational practices



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- ACDS has provided an extensive set of sample questions in the Areas to Explore section of the CET manual



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Any Questions?



This is a presentation of the
Alberta Council of Disability Services
Standards and Accreditation

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