

# Organizational Framework

# Organizational Framework Meetings

- As a Service Provider (SP), you will
  - establish the exact time that a video or audio conference call will be made
  - determine what virtual platform the team will be using and what equipment they will need (e.g., webcam, microphone, telephone)
  - let the survey team know the times and login information they will need
  - initiate the call
  - let all parties know how to login and ensure they are equipped to participate



# Organizational Framework Meeting 1

- The Organizational Framework (OF) meeting takes place on Day 1; the duration may be three hours
- The survey team will use this meeting to gather information to complete their data collection for the OF standards
- This meeting may be with your Chief Executive Officer or Executive Director alone or, depending on the size of your organization, it may include
  - members of the management team
  - your organization's internal accountant or bookkeeper



# Organizational Framework Meeting 1

- This is your opportunity to
  - take the survey team on a virtual tour of the facility
  - describe the organization and its services
  - acquaint the survey team with the individuals who access services as well as staff and others
  - discuss issues, trends, and changes that have affected your organization or its services over the last three years



# Organizational Framework Meeting 1

- This is also your opportunity to showcase your innovations and accomplishments over the last three years, including during the pandemic
  - What three accomplishments are you most proud of?
  - What innovative practices have you implemented?
  - What have been the outcomes of these?
- You and the survey team will also review and confirm the survey itinerary



# Organizational Framework Meeting 1

- The survey team will
  - summarize their understanding of the services offered
  - ask questions to clarify the information submitted to support alignment with the OF standards
  - comment on any final pieces of information they feel are critical



# Organizational Framework Meeting 1

- The survey team will also request access to
  - File Review Consents gathered from individuals accessing service and staff
  - files identified in the Self-Study Guide or during the OF meeting
  - any additional supporting documentation



# Virtual Tour

- The first virtual meeting needs to include a tour of your facility
- The duration will be 15+ min. depending on the size of your organization
- The survey team will want to see
  - administrative areas (e.g., entrance, reception, lobby, meeting rooms)
  - service areas (e.g., day program space, bathrooms, kitchens)
  - service and emergency equipment (e.g., ramps, fire extinguishers)
- Individuals and their staff may be invited to speak about their experience with your organization and how it impacts their lives





# Organizational Framework Meeting 2

- This meeting will take place if your organization has a Board of Directors
- The duration will be 30 minutes – 1 hour
- The meeting will be with one or more board members and the board Treasurer



# Following OF Meeting(s)

- The survey team will meet privately to
  - review the information gathered through the Self-Study Guide and at the OF Meeting(s), including any additional information provided
  - identify any items still required
  - develop a plan to retrieve this information virtually or digitally
- A review of the individuals' files before the conversations is important to giving the survey team a better understanding of the individuals



# Following OF Meeting(s)

- The survey Team Leader will
  - organize a division of labour for file reviews and conversations
  - set up a meeting with the Human Resources person to review staff files
- The survey team will, if possible, at this time,
  - participate in the first Quality of Life and Quality of Service conversation
  - record all preliminary ratings on their surveyor tools



# Exit Conference

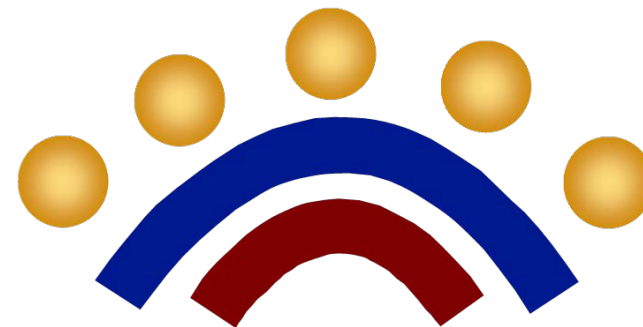
- On the final day, you will initiate a virtual Exit Conference with the survey team
- The survey team will want to
  - thank the CEO/ED and management team for their support and time
  - provide the CEO/ED a recap of the survey activities
  - identify strengths of the organization
  - give general feedback on each area of the standards



# Exit Conference

- The survey team will also
  - ask to see evidence for anything that is still unclear or unconfirmed
  - identify further site-survey activities that may need to be scheduled (e.g., conversations or verification)
  - explain the post-survey process





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

160, 3015 – 12 Street NE

Calgary, AB T2E 7J2

Ph: (403) 250-9495 • Fax: (403) 291-9864

Email: [accred@acds.ca](mailto:accred@acds.ca)