

Surveyor Training

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Surveyor Competency Framework

Workshop I

Knowledge

Quality Concept
Quality Tool
HPH Concept
HA/HPH Standards
Assessment
Health System



Skill

Reading
Analysis
Systems Approach
Relationship Building
Observation
Listening
Questioning
Reflection
Learning Facilitation
Writing
Coping with Diff.Sit.



Workshop II

Task

SA Analysis
Team Interview
Unit Visit
Doc/MedRec Review
Report



STA Fieldwork

Standard Work

Re-accreditation Survey
Accreditation Survey
Step 1/2 Assessment
ICV / CV
Learn & Share Workshop
Document Assessment



Surveyor Training Program

- **Training**

- 5 days on concepts, standards and scoring
- 5 days on assessment process (case study & field practice)
- At least 3 site visits under supervision

- **Evaluation**

- Evaluation by supervisor after each training
- Evaluation by hospitals after each survey
- Peer review after each survey



Surveyor Course I

- Code of conduct
- Communication & coaching skills
 - Questioning
 - Appreciative inquiry (exploration, recognizing the best in people or the world around us)
 - Spectrum of coaching skills
 - GROW model: goal, reality, options, wrap-up
- Standard
 - Decoding: intent, process, process owner, customer
 - Creative implementation
 - Review the self-assessment report -> plan for tracing
 - Scoring



Surveyor Course I

- Learning facilitation
 - Opportunity for improvement: data analysis, holistic view, hand-over, core values
 - Solutions: innovation, human factors, various sources
 - Lesson learnt: project evaluation, reflection, research
- Tracer
 - Clinical tracer
 - Trace patient safety goal
- Organization Alignment: challenge-strategic objective-KPI



Surveyor Course II

- Review self-assessment report & plan for site visit
- Site visit
 - Document review
 - Staff & team interview
 - Trace systems
 - Trace patient care
- Lesson learnt: coaching, systems thinking
- Report writing



Site Visit Planning from Hospital Profile (Key Hospital Information)

- What are the context of the hospital? How can we use this information for learning?
- What are the strategic challenges? How will we use this information for organization assessment?
- What are key patient population and related information? How will we use this information?
- What are the other interesting information?
- For each of the standard, where should we look for useful information in the hospital profile, and how will we use them?



Tracing Methodology

- **Purpose** (system, patient care)
- **Pathway** (select object/people/information that move)
- **Process/practice** at each steps & hand-over
- **Preparedness** for the unexpected situation
- **Performance:** review information the reflect the whole system)



Sharing Lesson Learnt from Site Visit

- **Situation:** what was the findings?
- **Purpose:** what was the purpose of coaching?
- **Approach** of coaching (GROW model, system thinking)
- **Result:** What was the result of coaching?



Identifying Good Practice

Introduction

How important it is

Focus

What is the critical issue in the hospital view

Plan & Do

Effective Approach

Breadth/Coverage of Deployment

Experience

Good process
Good effort
Good idea

Check & Act

Result

Good outcome
Value to customer



Identifying Opportunity for Improvement

Big Picture

Challenges/Recommendation

- **Analysis:** to define the scope & impact of the problem/challenge
- **Expand:** to expand the scope and purpose of the existing program
- **Change:** to change the concept of working (incremental or totally)
- **Reflection:** to create knowledge from the program



