



CARF Surveyor Information

Qualifications of a surveyor

To be eligible for selection and training as a CARF International surveyor, an individual must:

- Be currently employed in a CARF-accredited organization, or be employed by a governmental entity that works to improve the quality of human services.
- Have at least five years of current experience in the field. The experience must be in the program or service area for which the individual is applying to survey or in an administrative or managerial position.
- Have knowledge of and experience with the CARF standards.
- Have computer skills and access to a laptop for use on surveys.
- Be available to conduct at least three surveys per calendar year (January 1–December 31), including two surveys within the first six months following initial training.
- Not be employed by or perform any services for a competing accrediting body.

Candidates for surveyor positions should also:

- Have excellent interpersonal skills and the ability to work well as a team member.
- Have strong written and verbal communication skills.
- Have good time management skills.
- Have a consultative, rather than inspective, approach to the survey process.
- Be able and willing to travel to domestic and international survey locations and stay over Saturday night, as needed.

Surveyor expectations

Once trained, all surveyors are expected to:

- Conduct at least three surveys each calendar year, including two in the first six months following initial training.
- Travel to domestic and foreign survey locations and stay over Saturday night, as needed.
- Be consultative, not inspective, during each survey.
- Maintain current, relevant field knowledge and experience.
- Adhere to established guidelines for conducting surveys and surveyor behavior.

Surveyor Code of Conduct

CARF International is committed to the concept of ethical behavior for organizations that are seeking accreditation of their programs and/or services. This expectation for others has been internalized, and a code of conduct has been developed for the surveyor cadre. The purpose of this code is to reflect the high standards of professional conduct to which the surveyors adhere and for which the CARF International surveyors have become known.

The surveyor code of conduct is the foundation of the compliance process and guides professional surveyor behavior. It is built on the precept of quality customer service and driven by CARF International's mission and values. No code of conduct can identify appropriate moral conduct and ethical behavior for every situation surveyors may encounter; surveyors must also rely on good judgment. Surveyors should support, help, and encourage one another to comply with this code.

As a surveyor, you must follow all policies and procedures in the current Surveyor Policies and Procedures Manual and emulate the following behavior.

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Customer Service

A survey's success depends on continual awareness of and responsiveness to internal and external customers. Recognize and respond to the needs of all customers as a priority, throughout the survey process.

Examples

- Avoid confusing customers; apply standards in a manner consistent with official CARF International interpretations.
- Provide useful, bias-free consultation based on active listening.
- Minimize interference with the organization's regular operations.

Confidentiality

Information from the organization and persons served is private and confidential. Strictly protect and do not disclose private and confidential information to anyone outside the survey team or the organization.

Examples

- Comply with all applicable privacy and confidentiality laws.
- Dispose of materials in a manner that will protect confidentiality.
- Avoid disclosing to the organization information learned during interviews with persons served and funding and referral sources if confidentiality has been promised or requested.

Conflict of Interest

Surveyor independence is essential to the integrity of the survey process. Avoid all actual, potential, and appearances of conflicts of interest.

Examples

- Avoid soliciting employment, personnel, or business opportunities (e.g., distributing business cards for personal gain) until after a subsequent survey decision, in accordance with CARF International policy.
- Avoid working for or providing professional services to any entity that accredits in any of the same fields as CARF International.
- Avoid accepting from the organization any goods or services valued in excess of \$50.00 before, during, or after the survey process.
- Avoid marketing or selling any products or services to the organization or its employees before, during, or after the survey process.
- In a timely way, identify and declare to CARF International any relationships with organizations or individuals that would impair, or could be perceived to impair, full and fair application of standards.

Cooperative Relationships

Developing cooperative relationships is integral to a constructive and successful survey, so long as those relationships do not interfere with the survey process. Appropriately engage stakeholders in a professional manner.

Examples

- Limit all contact with individuals related to or associated with the organization to survey-related business.
- Treat all persons with dignity and respect.

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Attentiveness

Organizations purchase CARF International's undivided time and attention. You represent CARF International. Devote your full time and attention to the organization during the survey.

Examples

- Avoid conducting non-survey-related business during the survey, except as necessary to respond to an emergency.
- Avoid distraction from or interference with the survey process due to the presence of surveyor family members.
- Avoid non-survey-related use of cellular telephones during the survey day, except as necessary to respond to an emergency.

Sensitivity and Awareness

Sensitivity to and awareness of individual differences are essential parts of CARF International's mission and values. Treat each person in a caring and respectful fashion, mindful of individual differences and cultural and ethnic diversity.

Examples

- Avoid discrimination in any manner based on any individual's race, color, national origin, religion, citizenship status, veteran status, age, gender, sexual orientation, disability, or any other status protected by law.
- Avoid any personal or preconceived ideas, notions, or beliefs that may affect the survey process.
- Acknowledge and allay fears and concerns of organizations and persons served related to the survey process.

Dignity and Respect

One of CARF International's core values is that all people have the right to be treated with dignity and respect. Maintain a positive survey environment free from any form of harassment.

Example

- Avoid sexual or other harassment of employees or other representatives of organizations, persons served, or other surveyors, such as oral or written communications or other conduct, including physical conduct that tends to insult, degrade, tease, intimidate, or otherwise harass.

Safety

CARF International understands and is committed to a safe work environment. Help establish and maintain a safe environment by exercising good judgment and common sense.

Examples

- Avoid inattentive, reckless, or unlawful driving during and on the way to and from the survey.
- Avoid the use of unlawful drugs.
- Avoid the use of alcohol while on site or in excess at other times during the survey.
- Avoid taking unnecessary risks while on the survey.

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Safeguarding CARF International Assets

CARF's assets are funded almost entirely by the organizations it serves, and CARF's stability is critical to its ability to fulfill its mission. *Protect CARF's reputation and safeguard its financial, intellectual, technological, and other assets.*

Examples

- Submit for payment only actual survey-related expenses not charged to another source, in accordance with CARF International guidelines.
- Use the CARF International surveyor roster for official CARF International business only.
- Use and disclose CARF International proprietary materials (e.g., standards manuals, checklists, lists of discriminatory and frequently cited standards, and other copyrighted materials) and other information provided to surveyors solely in their capacity as surveyors only in connection with assigned surveys.
- Avoid speaking on behalf of CARF International, other than during the course of the survey, except with CARF International's prior consent.
- Avoid violating any laws, and immediately inform CARF International of any criminal charges.
- Avoid accepting survey assignments outside areas of competency.

Reporting

Reporting improper surveyor behavior allows CARF International to take appropriate remedial actions that promote professionalism and support ongoing compliance. Report to CARF International any event you reasonably and in good faith believe is a violation of this surveyor code of conduct. Report in accordance with CARF International's corporate compliance policy and procedures.

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