

CARF Surveyor Information

Surveyor eligibility requirements

Surveyor applicants must satisfy all of the following criteria:

- Current employment in a CARF-accredited organization, or employment by a governmental entity that works to improve the quality of human services
- Five years experience in the field for which the individual is applying, at least three of which are within the last six years
- Ability and willingness to conduct at least three surveys each standards manual year (July 1-June 30), including two in the first six months following initial training
- Excellent interpersonal and communication (written and verbal) skills and the ability to work well as a team member
- Good time management skills
- Good computer skills and access to a laptop to take on surveys
- Does not currently perform any services for a competing accrediting body
- Knowledge and experience with the CARF standards

Surveyor expectations

Once trained, all surveyors are expected to:

- Conduct at least three surveys each standards manual year (July 1-June 30), 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
- Satisfy CARF's annual continuing education requirements
- Adhere to established guidelines for conducting surveys and surveyor behavior

Surveyor Code of Conduct

CARF 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 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'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 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 and the organization's internal policies.
- 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 policy.
- Avoid working for or providing professional services to any entity that accredits in any of the same fields as CARF.
- 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 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.

Attentiveness

Organizations purchase CARF's undivided time and attention. You represent CARF. 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'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'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 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.