

## Quality surveying practices

Conducting effective tracers requires a robust and ongoing investment in surveyor recruitment, selection, and training, as these experts in their fields must also be intimately familiar with the tracer process.

Surveyors require a high level of emotional intelligence and an in-depth understanding of the profession, including the requirements of quality massage therapy education programs. They must be comfortable with ambiguity and be able to elicit information from a variety of people in a non-confrontational manner.

CMTCA invests in the development of surveyors in a number of ways to ensure consistency among site visits.

### Selection and recruitment

The process to become a CMTCA surveyor is rigorous as well as supportive. The process ensures that surveyors are skilled and capable ambassadors who can meet the challenge of carrying out quality site visits.

The following are the eligibility requirements to become a CMTCA surveyor:

- Currently employed by a massage therapy education program that has joined or plans to join the CMTCA accreditation process
- In-depth knowledge of massage therapy education
- Understanding of and experience with the Interjurisdictional Practice Competencies and Performance Indicators for Massage Therapists at Entry-to-Practice
- Extensive experience working in a leadership and/or faculty role in a massage therapy education program
- Knowledge of regional regulations for massage therapy education programs
- Excellent communication and critical thinking skills
- Familiarity with the CMTCA accreditation standards
- Able to meet time commitments and constraints (including pre-site visit preparation, travel time, and time needed for the site visits)
- Agree to follow the CMTCA code of conduct
- Successful completion of the CMTCA surveyor training (orientation and annual e-Learning)

The surveyor selection process follows these steps.

#### 1. Self-screening

Potential applicants must read the terms of reference and surveyor characteristics posted on the CMTCA website. If they believe they are able to do the job and they meet the eligibility requirements and agree to the terms of reference, they proceed to step 2.



## 2. Assessing essential qualifications

Applicants provide CMTCA with a CV or résumé, a cover letter demonstrating how they meet eligibility requirements, and three professional references. Applicants who fulfill these requirements are invited to proceed to the next step.

## 3. Telephone screening

If the application shows potential, CMTCA arranges a telephone interview to assess whether the applicant has the communication skills, scope of knowledge, and experience required of surveyors.

## 4. Professional references

CMTCA contacts the professional references for those who pass the telephone interview and discusses the applicant's experience and professional performance.

## 5. Shortlist

CMTCA shortlists those applicants who are felt to have good potential to succeed as CMTCA surveyors and invites them to participate in the training and orientation.

## Training and orientation

Surveyor candidates are invited to attend a five-day orientation and training, with the cost of attendance being covered by CMTCA. During the training, surveyor candidates learn about accreditation, the standards, and how to fulfill the role of surveyor. They also practice the skills they are taught at participating programs of massage therapy education, under a seasoned surveyor mentor.

Throughout the orientation and training, the surveyor candidates' performance is evaluated by mentors and qualified CMTCA staff, and they are given feedback following the training. While the candidates' performance during training is an essential determinant of success, the process does not end there.

## Performance management and quality control

Surveyor candidates who meet the performance requirements of the training program are assigned to site visits. For their first two site visits, they are matched with an experienced surveyor who mentors their performance. If a surveyor's performance is not satisfactory after participating in two site visits, they may be asked to take further training or discontinue their service.

As an important part of performance management for all surveyors, their fellow surveyors and the education program are asked to evaluate their performance and submit their comments to CMTCA after each site visit. Results are analyzed and shared with the respective surveyors. In addition, a CMTCA staff person attends every site visit to ensure consistent quality. The CMTCA staff person is trained to interject as needed during tracer conversations if additional information is required to determine compliance with standards. They are also trained to manage the behaviour and performance of surveyors and provide ongoing coaching and mentoring.

Surveyors are evaluated against the following characteristics, all of which are critical to quality site visits.

<b>Characteristic</b>	<b>Definitions</b>
Respect and humility	<ul style="list-style-type: none"> <li>▪ Supporting the development of the education program</li> <li>▪ Demonstrating an attitude of learning from others (particularly the education program staff, faculty, and students)</li> <li>▪ Not talking about their own accomplishments but staying focused on the program</li> <li>▪ Giving authentic, specific compliments</li> </ul>
Integrity	<ul style="list-style-type: none"> <li>▪ Honest</li> <li>▪ Objective, able to set feelings aside to focus on facts</li> </ul>
Discretion	<ul style="list-style-type: none"> <li>▪ Respecting the confidentiality and dignity of all parties</li> <li>▪ Respecting the boundaries within the education program concerning the sharing of information</li> <li>▪ Not conveying their findings or attitudes toward the program</li> </ul>
Inquisitiveness and adaptability	<ul style="list-style-type: none"> <li>▪ Digging deep to get full and detailed answers</li> <li>▪ Being curious about where a conversation may go</li> <li>▪ Being flexible enough to change a tracer plan if necessary to get answers</li> </ul>
Communication skills	<ul style="list-style-type: none"> <li>▪ Formulating topic-specific questions and asking them in a non-threatening manner</li> <li>▪ Explaining clearly</li> <li>▪ Actively listening</li> <li>▪ Writing concise but thorough information</li> <li>▪ Using a facilitative, supportive approach</li> </ul>
Professional and approachable	<ul style="list-style-type: none"> <li>▪ Pleasant and uses common courtesy</li> <li>▪ Dresses in business attire</li> <li>▪ Non-superior, non-judgmental approach</li> <li>▪ Provides helpful comments</li> <li>▪ Uses personal stories or anecdotes to explain the rationale for the information that they are seeking</li> </ul>
Organized	<ul style="list-style-type: none"> <li>▪ Planning methodically and following those plans</li> <li>▪ Not allowing diversions to derail them from their plans</li> <li>▪ Keeping a tidy, logical system of files and records</li> <li>▪ Conveying information to others in an orderly, methodical fashion</li> </ul>
Collaborative	<ul style="list-style-type: none"> <li>▪ Working with others on the team to accomplish common goals</li> <li>▪ Demonstrating cooperation rather than competitiveness</li> <li>▪ Supporting and recognizing the work of others</li> <li>▪ Focused on establishing positive relationships</li> </ul>

## Ongoing training and development

Supporting surveyors is key to the success of the accreditation process. To do this effectively, CMTCA created a surveyor education portal ([www.cmtcau.com](http://www.cmtcau.com)) to support surveyors and also to:

1. Offer ongoing training
2. Maintain a database where surveyors can search for keywords and find guidance to common questions
3. Foster a community of practice where surveyors can ask questions, share experiences, and contribute to each other's professional development

With regard to ongoing training and as part of its continuous quality improvement plan, CMTCA evaluated the pilot site surveyors' performance. Using the surveyors' profiles and the evaluations, CMTCA identified areas of improvement and created learning objectives for them.

Through the education portal, surveyors are able to undertake a variety of educational activities to broaden their knowledge, skills, and attitudes related to the accreditation of massage therapy education programs.