

Training surveyors in healthcare: from training to assessment practice

In contemporary healthcare systems, quality evaluation plays a central role as a driver of continuous improvement. In this context, accreditation processes have become increasingly relevant as external evaluation mechanisms that allow for a comprehensive analysis of how organizations work. However, a less visible —yet critical— aspect is the training of those who carry out these evaluations: the surveyors.

The goal of the Technical Institute for the Accreditation of Healthcare Establishments (Instituto Técnico para la Acreditación de Establecimientos de Salud, ITAES) is to train competent surveyors and, to achieve this, the institute has sought to develop a structured pathway that integrates training, practice, and progressive validation. The University Diploma Course in Quality Evaluation of Health Organizations, developed together with the Universidad Católica de Salta (UCASAL), constitutes the first step of this process.

The challenge: beyond content delivery

Training surveyors does not imply sharing knowledge of quality, rules or standards only. Fundamentally, it requires developing the ability to interpret complex organizations, analyze processes, identify risks, form well-founded assessment judgments, and acquire soft skills.

This requires integrating multiple dimensions:

- Technical knowledge (quality, patient safety, processes);
- Methodological tools (indicators, continuous improvement, data analysis);
- And relational competencies (communication, teamwork, professional ethics, emotional intelligence).

In this sense, traditional training based exclusively on content falls short.

The approach: a University Diploma Course focused on the role of the surveyor

The University Diploma Course is structured as a 200-hour training program, delivered online, that combines theoretical and practical components. Its design is based not only on a thematic sequence, but on a progressive logic aimed at developing the surveyor's role.

Throughout the course, various core areas are dealt with:

- **Fundamentals of quality and accreditation**, which allow to understand the purpose and the scope of healthcare evaluation.
- **Process management and continuous improvement**, incorporating tools such as indicators, data analysis, and methodologies to create and manage indicators, analyze data and improve processes.
- **External evaluation methodologies**, including international models and the ITAES' own methodology.
- **Organizational reading**, focusing on dimensions such as patient safety, risk management, and institutional culture.
- **Roles and functions of the surveyor**, with an emphasis on ethical aspects and teamwork.

This program is supplemented by modular assessments and a final comprehensive work, which requires participants to apply their knowledge to concrete situations.

From training to practice: a tiered model

One of the distinguishing features of this approach is that the diploma course is not an endpoint, but the beginning of a broader professionalization process.

In the case of the ITAES, the approval of the diploma course is a requirement to apply as a surveyor. From that point, a selection and validation process is deployed, which includes the following:

- submitting backgrounds,
- completing supplementary practical assignments,
- conducting a face-to-face interview,
- and participating in field observation experiences.

This model makes it possible to assess not only the knowledge acquired, but also the ability to apply it in real-world settings, as well as the interpersonal skills required for the role.

Key learnings

From this experience, we have identified several key learnings that may be applied in other contexts:

1. Training surveyors requires structured pathways, not isolated courses.

Developing evaluation competencies involves a progressive process that integrates different stages of learning and validation.

2. Assessment practice should be present from the training stage onward.

The use of case studies, integrative projects, and applied activities helps bring participants closer to the complexity of real-world evaluation.

3. Relational competencies are central.

Healthcare evaluation is not an exclusively technical activity; it involves dialogue with teams, building trust, and communication skills.

4. Context-based validation is essential.

Interviews, case resolution exercises and field observation experiences help consolidate the transition from training to professional practice.

Towards the professionalization of the surveyor role

In a context where healthcare quality is gaining increasing relevance globally, strengthening the training of surveyors becomes a strategic priority. The experience described here shows that it is possible to move towards models that integrate knowledge, practice and validation, thereby contributing to the professionalization of this role.

Beyond institutional particularities, the challenge is a shared one: to train surveyors who are capable of understanding the complexity of healthcare organizations and, through their practice, contributing to the continuous improvement of the quality of care.