

The Tracer Method

The tracer method is the process the Canadian Massage Therapy Council for Accreditation (CMTCA) surveyors use during a site visit to assess compliance with the accreditation standards. During a tracer, surveyors have discussions and ask questions that are related to the section of the standards they are “tracing.” They also make observations, review documents, and record their findings.

Tracers are an effective way to evaluate all aspects of an education program, rather than just the academic portion. The tracer method began in industry. It is now used by many major healthcare accrediting bodies, including the Joint Commission in the United States and Accreditation Canada, and has recently been introduced into the accreditation of education programs.

The tracer method in action

Conducting a tracer demands a high level of interaction with a wide variety of people connected with the education program, including faculty, staff, leaders, students, alumni, and clients/patients. Compared to traditional, primarily document-based methods of accreditation, much more time is spent in conversation and discussion. This process of collecting information from multiple and varied perspectives is at the heart of the tracer method.

Surveyors generally follow a 3x3 approach, whereby they speak with at least three people from each perspective (faculty/staff, students, clients/patients) as they determine how to rate a criterion. Conflicting information is an indication that more discussion and observation is needed.

The intent is to determine, on the ground and in the moment, whether the requirements of the standards are established and actively followed by the education program. Supporting documentation (i.e., policies, procedures, plans) is requested from the people most likely to be using it and reviewed where it is usually located.

Tracers put an end to accreditation binders filled with policies and plans. They also add a rigour to the process that cannot be overstated—the more people surveyors speak with, the more objective the findings.

During the site visit, surveyors may talk to anyone at any time throughout the facility. This allows them to collect authentic and relevant information to determine if the standards are met. While the two days are busy for the surveyors and the education program, the information collected provides invaluable feedback for assessment and improvement.

The benefits of tracers

The tracer method was piloted at eight massage therapy education programs across Canada in spring 2016. The pilot site programs reported a number of benefits, such as:

- Having an outside body look at our processes strengthens our organization and our program.
- It validated our environmental scanning regarding gaps.

- The scrutiny by outside professionals lets our students and instructors see the confidence we have in our program and allows them to take an active part in the change process.
- We liked that information is sought from those directly affected (students, staff, alumni, clients).
- Staff felt comfortable knowing they could explain their process for different tasks.
- It shows how the school actually operates rather than just making things look good on paper.
- We can see the layers of our policies or procedures, and determine if they have lost intent or momentum.
- It assesses all aspects of a program, not just delivery of material to students, and provides direction for improvement in delivery as well as administration.
- Tracers examine strengths and shortfalls.

Pros and cons

The benefits of the tracer method for education programs are many and varied.

- Preparation time prior to the site visit is reduced because minimal documentation must be submitted prior to the visit.
- The inclusiveness of the process spreads the value of accreditation throughout the program because surveyors speak with everyone involved in the education program.
- Involving everyone in the accreditation process helps create and support a true culture of quality improvement.
- Given the paramount importance of safety in the training of healthcare professionals, tracers add an investigative depth to the site visit that is not possible with traditional approaches.

On the other hand, while there is not a lot of documentation to be submitted prior to the site visit, the visit itself can be an intense time. Surveyors may need to speak with some people many times as questions arise during their tracer activities. This can be disruptive and disconcerting for the education program; however, the upside is that it is only for two or perhaps three days, and the education program faculty, staff, students, and others have a chance to learn about quality improvement and accreditation from experts in the field.

Tracers offer education programs an in-depth accreditation experience, with numerous opportunities to highlight key areas of importance such as student experience and the quality of the faculty, staff, program leadership, and worklife. Each of these has a direct effect on quality learning outcomes and the safety of the program and graduate practices.

A creative and flexible tool

In the end, surveyors and education programs who experience a tracer in action find it to be a creative and flexible tool that provides an in-depth understanding of how a program operates and the extent to which it meets or exceeds accreditation standards.