

Inspector Team Leader Guidance

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1. Introduction

JACIE inspector team leaders are experienced inspectors who lead a team of other inspectors through the onsite or remote inspection of a centre. Team leaders can be clinical, collection, processing or quality inspectors. They are responsible for inspecting at least one area of the programme and leading the team. They are the point of contact between the inspection team, the programme to be inspected and the JACIE Office.

This document has been prepared in collaboration with experienced team leaders and explores what makes a good JACIE team leader. It provides helpful guidance on how to fulfil the role and aims to describe how team leaders can get the best out of the centre being inspected and the inspection team during the process.

It aims to improve understanding of:

- The role and responsibilities of team leaders.
- What personal and technical skills team leaders need.
- Key tasks for team leaders.
- Managing a team – on-site and remotely.

2. Who are the team leaders?

The inspection team typically includes an inspector from each area included in the inspection scope and a quality management inspector. The final number of inspectors will depend on several factors, including the number of sites, areas of inspection and whether the inspection includes both paediatric and adult transplant facilities. One inspector will also be assigned the role of team leader. If needed, observers/trainees and/or language facilitators can be included in the team (Figure 1.).

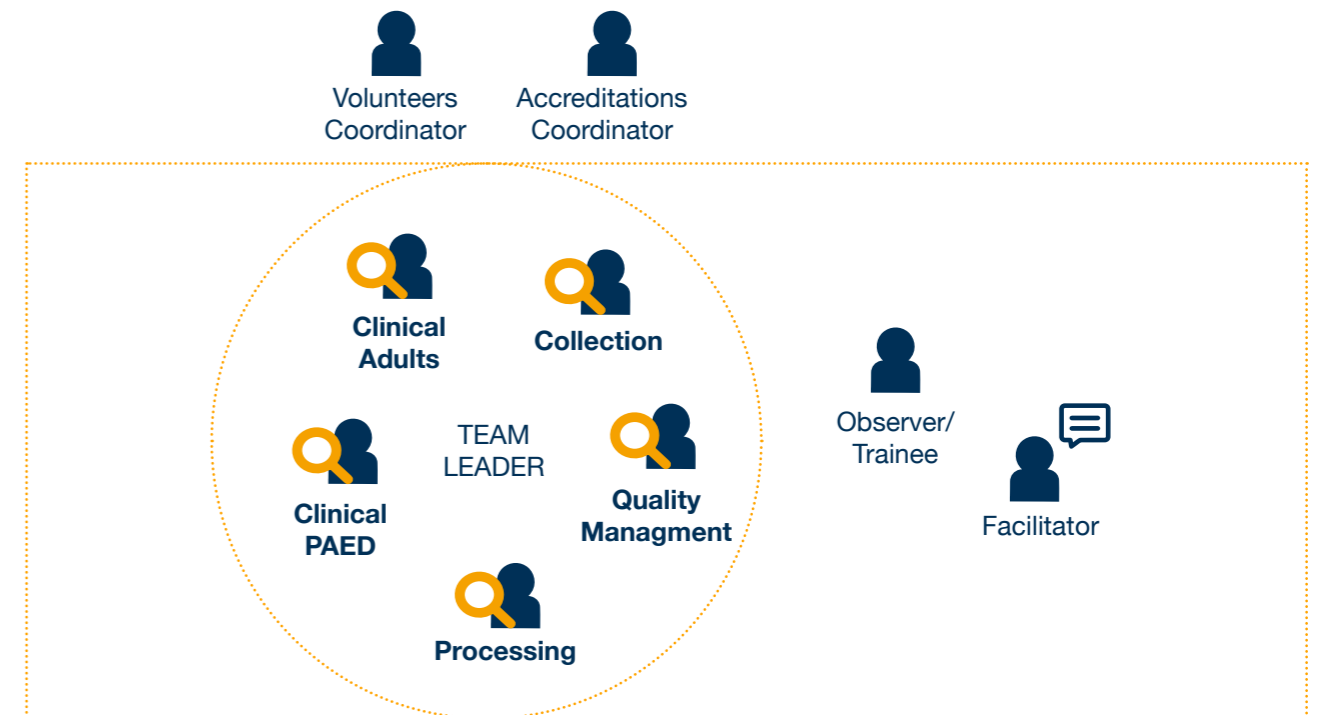


Figure 1. JACIE inspection team

Inspectors are approached by the JACIE office to take on the team leader role and it is recommended that inspectors have participated in at least two inspections before this. Team leaders are vital to the smooth preparation, transaction and reporting of the inspection process. JACIE accreditation coordinators will support the team leaders in preparation for the inspections as well as completion of reports.

The team leader role has two main focuses: to support fellow inspectors in performing the inspection to the best of their abilities and ensuring that the reports are returned within the agreed timelines (Box 1). If one of the inspectors does not respond to emails or does not meet the pre-agreed timelines, JACIE coordinators will ensure that the team leader is updated and will liaise with the team leader on strategies to help the inspector fulfil their obligation.

The Team Leader ensures

- a timely and effective inspection
- the inspection team works effectively together

The quality of inspections determines the value of JACIE accreditation

Box 1.

Leading the team is rewarding and motivating for inspectors because they can share their knowledge and skills with new and less experienced inspectors, and they are given the chance to develop their leadership skills. All JACIE inspectors are expected to be professional and have excellent communication and organisational skills. Box 2 describes some additional soft skills that help make good team leaders.

- **Self-awareness** – a self-aware team leader understands their role within the context of the inspection and can share this with their team. JACIE inspectors are not the ‘judge’ but rather the ‘reporter’, taking a snapshot of how the centre carries out its activities to meet the requirements of the standards. JACIE inspectors are not assessing the centre’s compliance against the standards from a ‘legal’ perspective because JACIE is not a regulatory body. Inspectors are making peer-review decisions based on objective findings.

- **Situational awareness** – team leaders set the tone for an empathic approach to the inspection. Good team leaders understand not only the concrete contexts of the inspection, but also the culture, expectations, reactions and worries of all those participating in the inspection. This includes an understanding of local solutions as well as conflicts of interest which might impact the inspection. There might also be someone on the inspection team who is feeling unsure as they are from e.g., a different cultural background or participating in their first inspection. A team leader can make a significant contribution by helping this inspector get the most out of their experience through taking time to ensure they are supported and understand the proceedings.

- **Adaptability** - most inspections do not go to plan, no matter how thorough the preparation. Team leaders must be agile and flexible to adapt to the evolving situation. Adaptable team leaders look out for opportunities to ensure the team works efficiently and effectively. Whether it is an issue with the inspection process or the team, the team leader should be experienced enough to know who to consult and inform to ensure the inspection process works well and issues are resolved as smoothly as possible.

- **Assertiveness** – good team leaders clearly state what needs to happen. Being direct helps to promote improvements in efficiency and communication during an inspection.

- **Good motivation** - strong team leaders are motivated by a personal commitment to achieving good results. All team leaders should value high quality care and see the JACIE inspection process as a way of helping transplant programmes implement best practice standards.

Box 2. Soft skills needed by JACIE inspector team leaders

2.1. Application of soft skills

Scenario

An inspector is having difficulty submitting their section of the report and the deadline has passed.

Team leader action

A good team leader will try to contact the inspector colleague and find out more about the situation and whether the JACIE office or the other inspectors can do anything to help. It is important to keep up a good rapport and ensure the communication lines remain open. It is also good practice to keep the JACIE office informed as needed.

Soft skills used

1. **Self-awareness** – the team leader understands their role within the context of the inspection and by contacting the inspector to ask if any assistance is required, helps to ensure a more timely and effective inspection.
2. **Situational awareness** – the team leader is alert to the timelines for submitting the inspection report and is aware that there may be factors hindering a member of the team from submitting their report on time. By reaching out, the team leader can support the inspector and potentially help to resolve any issues as smoothly as possible.
3. **Adaptability** – not all inspections go to plan and by keeping the communication lines open between the inspection team and the JACIE office, the team leader is in a good position to help resolve any issues as quickly as possible and get the inspection reporting process back on track.

4. **Assertiveness** – the team leader is clear about the timelines or submitting the report and promotes open communication to ensure that the inspectors can be direct if there are issues delaying the completion of the report.

5. **Good motivation** – by taking the initiative, the team leader shows a personal commitment to achieving good results.

3. Overview of team leader tasks and responsibilities

Table 1 summarises the team leader's tasks and responsibilities during a JACIE inspection.

INSPECTION STEP	TASK RESPONSIBILITY	ACTION
PRE-INSPECTION	Timetable	The team leader prepares and approves the inspection timetable to include timings and logistics.
	Pre-audit documentation and inspection checklist	As for all inspectors, team leaders review the pre-audit documentation and checklist ahead of the pre-audit teleconference and request additional documentation as needed.
	Pre-audit teleconference	With the administrative support of the JACIE office, the team leader chairs the teleconference and makes sure that the whole inspection team understand their roles and the nature of the programme to be inspected.

INSPECTION	An in-person meeting for the team before the opening meeting	Wherever possible, the team leader takes a little time to get to know the fellow inspectors and build a good rapport amongst the team by arranging a face-to-face meeting the evening before the inspection.
	Opening meeting	The team leader leads the introduction meeting. This can be spoken from notes but should be brief (10-15 minutes at most), welcoming, and focused.
	Inspection of facilities	The team leader inspects the facilities they are responsible for and ensures the other inspectors have inspected their areas.
	Interviews	The team leader interviews the staff of the areas they are responsible for. It is also good practice for the team leader to get a sense of the programme's leadership by either interviewing the programme director themselves or sitting in with one of the other inspectors. This will assist the team leader in writing a good inspection summary report that reflects the overall impression of the programme and the interactions in places between the different services.
	Closing meetings	Lead the closing meetings (there are 3 types): <ul style="list-style-type: none"> • Meet with the inspection team to agree the main messages to share with the inspected centre. • Meet with the programme director before the team close out meetings. If there are any significant problems, the team leader should take the inspector of the relevant area(s) with them. The message should be constructive but accurately reflect the findings of the inspection team. • Summarize the major findings in the areas inspected, outline the next steps, thank the staff of the centre and encourage them in a positive way to keep progressing through their JACIE journey.

POST-INSPECTION	Completion of the inspection checklist and summary report.	The team leader completes their sections of the inspection checklist and summary reports and encourages the other team members to submit their respective reports within the deadlines.
	Finalise summary report and inspection checklist	The team leader liaises with inspectors who haven't submitted the report and/or checklist by the deadline and informs the JACIE office of any significant delay from any team member. The leader reviews all parts of the summary report and confirms with the accreditation coordinator that the summary report and checklist are complete and consistent.
	JACIE committee and evidence of corrections	The team leader answers queries from the JACIE report assessors and JACIE Accreditation Committee. The team leader might be asked to support the JACIE Office in collecting the final assessment of the evidence of corrections from the other inspectors within the deadline.

Table 1. Team leader tasks and responsibilities

4. Team leader tasks and responsibilities

The team leader is an expert in their field of practice and an experienced inspector. With support from the JACIE office, the team leader makes sure that the inspection process is well conducted by the team of inspectors and he or she is the referent for the other inspectors.

The JACIE accreditation process consists of three phases (Figure 2) and there are important processes within each phase that the team leader is responsible for. The following sections explore the team leader's tasks and responsibilities in each phase in more detail.



Figure 2. The three phases of the JACIE accreditation process.

4.1. Pre-inspection

This phase covers all activities from the time a centre submits an accreditation application to the JACIE office until the date of the inspection.

Team leaders will liaise closely with a volunteers' coordinator and an accreditation coordinator in the pre-inspection phase to ensure that they work collaboratively with their inspector colleagues to prepare and plan for the inspection.

It is during this phase that the team leader should communicate to the JACIE Office if there are any concerns about the readiness of the centre to go through inspection after reviewing the documents. The team leader may also be part of the decision-making as to the size of the inspection team e.g., a big programme or sites more than 50 km away from each other might need more inspectors.

Apart from this, the team leader has three main tasks during pre-inspection: preparing the inspection timetable, reviewing the pre-audit documentation and checklist for their own area, and finally arranging, leading and following-up on the pre-audit teleconference. To note, the documentation from the JACIE office is provided in English, which is also the default language in multilingual settings, unless another language is agreed by the inspectors.

4.1.1. Timetable

Team leaders are responsible for helping to prepare and approve the inspection plan (inspection agenda and interview timetable) from a template provided by the JACIE Office (Figure 3).

TIME	LOCATION To be completed by APPLICANT	ACTIVITY	INSPECTORS	ACCOMPANYING STAFF To be completed by APPLICANT
08:00-08:30		Meet inspection team and accompany them to meeting room	All	
09:00-09:30 approx. 30-60min		Opening Meeting	All	
09:30-10:30 approx. 30-60min		Tour around facilities demonstrating linksn between facilities ¹	All	
10:30-12:00 approx. 30-60min		Document review	All	QM to be available during the review of documentation
12:00-13:00		WORKING LUNCH	All	
13:00-17:00		Document review and Interviews <i>*See 7.0 Interviews Details</i>	All	QM to be available during the review of documentation <i>*See 7.0 Interviews Details</i>

AREA / SCOPE	POSITION / ROLE To be completed by INSPECTION TEAM Insert or delete positions as necessary	NAME + LAST NAME To be completed by APPLICANT
	Programme Director	
	Transplant physician/Consultant/Specialist	
	Physician in training	
	Quality Manager	
	Senior Nurse	
	Nurses in training (or newest nurse in the unit)	
	Other BMTu nit nurses	
	Pharmacist	
	Intensive Care Lead	

Figure 3. Inspection plan template for onsite inspections

Team leaders should liaise with the other members of the inspection team to agree on the timetable and lists of staff each inspector wishes to interview during the inspection. Staff roles, e.g., Collection Facility Medical Director can be listed, individual staff names are not required. Team leaders can guide more junior members of the team to ensure that the plan is in line with the organigram included in the pre-inspection documentation provided by the centre.

It is the responsibility of all inspectors, as well as the centre coordinator, to contribute to the inspection plan for their scope. This will help to ensure the relevant staff are available on the day and assist the inspectors to make the most of their time. Ideally, team leaders sign-off the final full inspection plan (running order and interview list) at least two weeks before the inspection.

The accreditation coordinator will then share it with the centre so that information about the location and names of the personnel who are needed for interview can be added. Finally, the plan is sent back to the accreditation coordinator who will share it with everyone (inspectors and centre).

4.1.2. Pre-audit documentation and inspection checklist

As expected of all inspectors, the team leader reviews the pre-audit documentation and checklist for their area in advance of the pre-audit teleconference and inspection. Team leaders should request additional documentation as needed and prompt other inspectors to do the same.

4.1.3. Pre-audit teleconference

The accreditation coordinator liaises with the team leader and wider team to set the date for the teleconference. The team leader chairs this meeting. The guidance from the JACIE office is that the teleconference takes place at least 2 weeks before the inspection date, otherwise it loses its purpose and there may not be sufficient time to act on proposals.

It is also important that the inspectors find enough time to review the documents before the teleconference so that:

- key issues identified within the documents can be discussed
- shared concerns or themes can be highlighted
- there is enough time to resolve any issues, wherever possible, in advance of the inspection

The team leader, along with the other inspectors and the JACIE accreditation coordinator meet using Microsoft Teams. It is expected that the whole inspection team, including trainees, must actively participate in the teleconference. This helps with planning and gaining a deeper understanding of the centre and how the inspection will be organised. The teleconference discussion can be held in the inspectors' home language (if everyone speaks the same language).

If needed, the team leader should liaise with the JACIE office to discuss the timing of the meeting so that the team can make the most of the teleconference.

The topics included in the teleconference agenda are:

I. Pre-audit documentation

This is to check that the whole inspection team has a clear idea of how the programme works and its interactions with its facilities and other services.

II. Open discussion

This is an opportunity for the team to share their thoughts on the centre and to see if everyone is on the same page by

- establishing the background and experience of the inspection team
- discussing the nature of the programme to be inspected and reviewing the previous inspection summary

III. Extra documents to be requested

This allows the inspection team to coordinate requests for additional documents if these are essential to gain a better understanding of the programme.

IV. Distribution of standards among the inspection team

This ensures that all the team members know what facilities they must inspect and which sections of the checklist and report they must complete. The team leader must communicate clearly so that

- all relevant areas are inspected
- there is no overlap among inspectors regarding sites or areas to be inspected

V. Agenda / plan for the inspection

This ensures the inspection team is aware of the time management plan for the inspection days and allows them to raise any doubts or concerns. It allows the team to check that all the relevant staff that must be interviewed have been included in the schedule. Other points to cover:

- opening and closing meeting times
- tour of the facilities
- interview timetable
- timings of procedures e.g., collection, reinfusion of cells
- due date for completing the report and the checklist after the inspection

VI. Logistics

The team leader and inspection team can raise any concerns or queries they have to the accreditation coordinator such as pre-inspection documentation, the use of

interpreters during a multilingual inspection, access to and use of SharePoint, travel and accommodation issues.

VII. Communication between meetings

The team leader may want to consider setting up a way to communicate easily with the other inspectors and accreditation coordinator e.g., a WhatsApp group, email group or similar. This can help in checking in with team members to ensure their travel arrangements are proceeding well, coordinating meeting up immediately prior to the inspection, and asking for general advice and comments from team members during the inspection.

4.1.4. Pre-inspection challenges

Although rare, there have been times when a member of the inspection team has not completed the necessary pre-inspection tasks or responded to the JACIE office about a matter. Some of these challenges are set out in Table 2.

ISSUE	ACTION
<ul style="list-style-type: none"> Not confirming travel arrangements / not responding to the travel agency which can result in additional travel cost if last minute arrangements are needed. Responding late about inspection preparation – e.g. change of bank details, or a request for a printed copy of the checklist. 	<ol style="list-style-type: none"> There are several steps the JACIE office takes to reach out to inspectors with reminders or to try and resolve any issues. Team leaders are copied in on reminder emails to keep them informed. The JACIE office makes every effort to avoid a delay to the inspection, but if this is a consequence, the team leader and centre will be updated.

Table 2. Pre-inspection challenges

4.2. Inspection

This phase covers the onsite pre-inspection meeting, through the days of the inspection (onsite or remote) until the inspectors depart for home after the closing meetings. Apart from the usual tasks for inspectors during an inspection, there are 4 responsibilities for the team leader during this phase: arranging the pre-inspection meeting, leading the opening meeting, guiding trainees and leading the closing meetings.

4.2.1. Meeting for the inspectors before the opening meeting (not possible for remote inspections)

Meeting through email correspondence doesn't allow the team to get to know each other that well or create a team atmosphere. The team leader should wherever possible take time to get to know fellow inspectors and build a good rapport amongst the team by arranging a face-to-face meeting the evening before the inspection or if travel arrangements don't permit, at breakfast on the day of inspection. Building a sense of team will make the inspection process more efficient and help communication amongst the inspectors.

4.2.2. Guiding trainees

If there are trainees on the team, the team leader should plan to pair them up with the inspector that has the same scope and advise them on how to spend the time and what to do. Trainees should see one area thoroughly. It's also important to ensure the trainee's inclusion in all team activities.

4.2.3. Opening meeting

The team leader introduces the inspection team to the staff of the centre and explains the purpose of the inspection and how it will be carried out, including the feedback process at the end of the inspection. The team leader takes this opportunity to remind the centre that the final close-out meeting is open to all staff.

The team leader will introduce each inspector in turn who should be prepared to introduce themselves and give a summary of their professional background and their inspection experience, rounded off by the team leader doing the same. The team leader can stress that the inspectors are a group of clinicians, experienced laboratory personnel and quality managers working in haematology, oncology or related areas doing the same job as those being inspected.

The team leader will explain that the inspectors are the eyes and ears of the JACIE Accreditation Committee (JAC) and that they do not make the final decision as to whether accreditation is awarded as this decision is taken by the JAC once it has reviewed the findings of the inspection team. The inspection agenda is confirmed, and the centre is reassured that the information obtained during the inspection will remain confidential.

This should not be a prolonged introduction and should take no more than 10 - 15 minutes, so the inspectors should be reminded of this at the pre-inspection meeting to ensure that their introductions are focused but informative.

Finally, the team leader should ask the centre staff if they have any questions they would like to ask about the inspection process, either specific or in general.

The opening meeting influences the atmosphere of the inspection and is a valuable opportunity to set the tone. Some points to consider are set out in Box 3:

- Be punctual
- Introduce the inspection team
- Reassure the centre about confidentiality
- Explain the purpose of the inspection and the roles and responsibilities of the inspectors
- Summarise the scope and content of the inspection as well as the inspection process
- Confirm the schedule for the inspection days.
- Confirm the schedule and availability of personnel for the inspection days.
- Make last minute adaptations as needed (clinicians and other staff may not be available as planned).

Box 3. Opening meeting script points

4.2.4. Inspection of facilities

The team leader should ensure that there are no gaps in the inspection due to time pressures. It is important to keep momentum going and make sure everything is inspected / reported. 'Time-out' meetings e.g. the working lunch or dinner can help to encourage open discussions so that everyone can share their experiences and any gaps can be dealt with. Information can be pulled together from other inspectors to cover any

questions, or a plan can be made to inspect any remaining standards. Sometimes difficult situations come up during an inspection and it is important to have a team atmosphere so that everyone feels comfortable and confident to discuss issues and one of the important roles of the team leader is to facilitate this.

During the inspection, the team leader interviews the staff of the areas they are responsible for. It is also good practice for the team leader to get a sense of the programme's leadership by either interviewing the programme director themselves or sitting in with one of the other inspectors. This will assist the team leader in writing a good inspection summary report that reflects the overall impression of the programme and the interactions in places between the different services.

4.2.5. Closing meetings

Three meetings are held to bring the inspection to a close: the inspection team meeting, the exit meeting with the programme director and the closing meeting.

I. Inspection team meeting

The members of the inspection team attend this meeting. The team leader should invite each inspector to give a short summary of their overall impression of the area(s) they inspected and highlight areas of non-compliance and any other concerns they have. The inspectors' findings can then be compared.

The team leader should ensure that inspectors crosscheck findings where corresponding standards appear in different sections ('mirror' standards e.g., labels) or where the findings in one section should be consistent with a related standard in another section. In the interests of time, this crosschecking doesn't need to be completed during this meeting, but the team leader should remind team members to do this before they submit their final reports, even if this crosschecking is completed by email after the inspection.

The team leader should then summarise what they will be sharing with the programme director based on the feedback from the inspectors and sense check this with the other inspectors. The team leader should invite each inspector to summarise the feedback they will be giving at the final close out meeting, emphasising that feedback should focus on broad areas of good practice and improvement opportunities, with the detail to be found in the checklist.

The team leader must remind the inspectors that the purpose of the close-out meeting is to:

- acknowledge the hard work the centre has dedicated to preparing for the inspection
- highlight areas of good practice
- identify improvement opportunities
- provide feedback in a constructive way

II. Exit meeting with programme director

This is usually conducted between the team leader and programme director and is a private briefing about findings that may be of a sensitive nature or unexpected. The team leader must be mindful of any cultural or organisational issues that may result in their constructive comments being considered as criticism.

The team leader can stress that areas of non-compliance against the standards should be considered as quality improvement opportunities and that this will be highlighted at the close-out meeting. The programme director should be given the opportunity to feed back to the team leader on the accuracy of their comments, as the programme director may have information about the centre's activities that the team leader has not been aware of, and which could impact the findings. The team leader must be receptive to this information and be prepared to change their findings based on the feedback from the programme director, if this is justifiable and evidence based.

This is also an opportunity for the team leader and the programme director to agree on any areas that are challenging for service delivery and that the programme director would want emphasised by the inspection team in their feedback and reports. This is to facilitate the centre in getting the evidence needed to request resources for service developments through its organisational management structure.

Other members of the inspection team may be invited and should be prepared to discuss their findings with the programme director as directed by the team leader.

III. Closing meeting

This meeting closes the inspection and is led by the team leader, with the support of the full inspection team. The meeting is open to all staff from the centre who wish to attend. The programme director is responsible for arranging who attends from the centre and the wider organisation.

The centre often has an expectation that it will be told if it has 'passed' or 'failed' at this meeting, especially if it is a first-time accreditation. The team leader should explain that although this is a key milestone in the accreditation process, there are further steps to take before accreditation can be awarded and set out what these are.

The centre staff will usually be feeling very tired at the end of what might have been a challenging couple of days, so the team leader should set a positive tone, emphasising how grateful the team has been for the professionalism and courtesy shown, and acknowledge the hard work done by everyone in the centre.

The team leader should phrase feedback positively, congratulating the centre for the good practice observed and present a few examples that were discussed during the inspection team's closing meeting. The team leader should also emphasise that any areas found to require improvement should be thought of as an opportunity to review processes to the benefit of patients and staff because the JACIE process supports centres in a journey of continuous improvement. The team leader should remind the centre how much good practice has been observed and to keep this in mind when they hear of any processes that require improvement.

The team leader should give a 'helicopter' view of how the inspectors have found the activities of the centre and then invite each inspector to provide a summary of their findings. The team leader rounds off by thanking the centre again, congratulating them on getting to this stage in the JACIE journey, and then handing back to the centre for their closing remarks.

Box 4 provides a summary of the team leader's script points for the closing meeting to the centre's wider team.

- Make it understood that the team leader leads this meeting.
- Suggest that questions and discussion be kept to the end.
- Thank the organisation for their assistance and collaboration.
- Repeat the reassurance of confidentiality.
- Repeat in general the scope of the inspection.
- Highlight and praise the good points and efforts of the centre.
- Explain that even though many things were in order, it is the inspectors' duty to report those areas where improvement opportunities have been identified
- Mention that the inspection is a 'snapshot' of what has been seen during the days of the inspection and can never be fully complete.

- Refer to the later report that is issued by the JACIE accreditation committee (JAC). Explain that the team's findings of how the centre carries out its activities will be reviewed by the JACIE accreditation committee who will then determine the level of compliance of the centre's activities against what is required by the standards. This will then be shared with the centre in a report that will summarise if there are minor or major compliance deficiencies and allocate a time for the improvements to be completed in.
- Allow feedback, reactions and explanations from the centre and inform them that evidence and further documentation can be provided after the inspection.

Box 4. Summary of the script points for the closing meeting to the centre's wider team.

4.2.6. Inspection challenges

Due to the JACIE inspector recruitment process and training pathway, serious challenges with the performance of inspectors during an inspection are uncommon. However, there may be occasions when an issue is raised with either a team leader or the JACIE office. Some examples include a centre's perception that an inspector does not understand one of the JACIE standards, there is a concern that an inspector is assessing a centre against their own centre's practice rather than the JACIE Standards or they believe the inspector's conduct falls below what is expected. Generally, team leaders are not involved in the resolution of conduct concerns but might be asked to provide a statement about the matter. See Table 3 for more information. These issues may be raised during or after an inspection but will be addressed here for ease.

ISSUE	ACTION
A concern or complaint is raised that an inspector does not understand one or more of the JACIE standards.	<ol style="list-style-type: none"> 1. If this is raised with the team leader during the inspection, they should try to resolve it at the time by listening to the concern and helping to manage it by referring to the JACIE standards and providing further explanation and context as needed. 2. The team leader should let the JACIE office know so that it can be recorded in case of follow-up. 3. All informal and formal complaints brought to the attention of the JACIE Office will be recorded and investigated by the JACIE office. The office team may contact an experienced team leader for additional information, but any action required will be responsibility of the JACIE Office.
A concern or complaint is raised that an inspector is assessing a centre against their own centre's practice rather than the JACIE Standards.	<ol style="list-style-type: none"> 1. If this is raised with the team leader during the inspection, they should try to resolve it at the time by listening to the concern and helping to manage it by referring to the JACIE standards and providing further explanation and context as needed. 2. The team leader should let the JACIE office know so that it can be recorded in case of follow-up. 3. All informal and formal complaints brought to the attention of the JACIE Office will be recorded and investigated by the JACIE office. The office team may contact an experienced team leader for additional information, but any action required will be responsibility of the JACIE Office.
A concern is raised that an inspector's conduct has fallen below what is expected e.g. aggressive questioning, rude manner, confrontational approach or dismissive of the centre's staff/fellow inspectors etc.	<ol style="list-style-type: none"> 1. If this is raised with the team leader during the inspection, they should remain calm and be courteous to the centre and the inspector. 2. This can be a difficult situation and there might be some cases in which the team leader can use strategies to diffuse the situation and complete the inspection e.g., meeting with the programme director and inspector to resolve a misunderstanding, requesting an interpreter for the remainder of the inspection or arranging to conduct joint interviews. 3. The team leader must contact the JACIE office so that a record can be made and for further advice and support, especially when a situation is unsalvageable.

Table 3. Inspection challenges

4.3. Post-inspection

There are three main responsibilities for team leaders in the post inspection phase namely finalising the inspection checklist and report for submission to the JACIE office; the presentation of the report to the JACIE accreditation committee (carried out on their behalf by the JACIE office) and review of the evidence of corrections for any non-compliant standards.

4.3.1. Completion of the inspection checklist and summary report

The team leader must complete their section of the inspection checklist and summary report and ensure that the other inspectors have done their parts within 2 weeks of the end date of the inspection. This includes

- cross-checking ‘mirror’ and similar standards with the other inspectors, as well as completing their sections within the summary report.
- encouraging the inspectors to do as much of this cross-checking during the inspection and to complete any final checks by email, WhatsApp or as agreed once home.
- agreeing with the inspectors how they will be liaising over the coming 2 weeks.
- encouraging the inspectors to submit their reports within the 2-week window.
- agreeing how the team leader can be contacted by the inspectors if they have queries or any unexpected time pressures once home.

Before leaving the inspection site, the team leader should gain agreement from the team that they will provide notification when they have completed their online reports so that the team leader can review these.

Once the team leader has completed this final review, they should inform the inspectors that the documents are in the final version, highlight any significant changes, and seek confirmation that the team agrees with the final version. The accreditation coordinator should be copied in on all correspondence in relation to report and checklist completion, so they are aware of how the process is progressing and of any time challenges.

Once the inspectors have agreed the final versions of the documents, the team leader informs the accreditation coordinator that the summary report and checklists are complete, coherent and consistent.

There may be situations where inconsistencies across ‘mirror’ or similar standards are justified and if so, this should be explained in the summary report and/or checklist.

Box 5 provides an experienced team leader’s summary of what helps to compile a good inspection report.

“The final report starts with a good planning and execution of the inspection. Following up with the centre and the other inspectors in a timely manner at all stages of the inspection as well as making sure they receive frequent reminders, ensures that all the checklists, sub-reports and data are at hand when finalising the report.

Check and cross-check all the checklists and reports to ensure consistency. Use all available sources of information to write the report, which includes the presentations given at the opening meeting. Check any centre internet site or other official sites for more information if possible. Write a brief history of the centre and include geographic and demographic data to make sure the contextual framework is in place.

Request or collect information along the way that might be useful. Make sure that any partial- or non-compliant issues are duly commented or explained.

Emphasize what was positive and always be polite and diplomatic, although it is necessary to be clear on deficiencies that need to be corrected. Finally, thank the centre, the inspectors and the JACIE Office for their participation and good advice along the way. Make yourself available for questions and any issues that might come up post inspection”.

Box 5 A summary of what helps to compile a good inspection report

4.3.2. Post-inspection challenges

I. Before the JACIE accreditation committee meeting

There are times when the JACIE office needs the support of the team leader to get the inspection report ready for presentation to the JAC. This might happen if inspectors are faced with unexpected circumstances or challenges upon return from an inspection and do not have time to submit their reports on time. This can have a significant impact on the completeness of the report presented to the JAC and their ability to take a view on the centre's accreditation status. Hopefully this situation can be mitigated if team leaders follow the process described in Section 4.3.1 'Completion of the inspection checklist and summary report'. However, it can still happen, and Table 4 sets out how team leaders can help in these situations.

ISSUE	ACTION
Delays to completing the report in time for the JAC meeting.	It is recommended that inspectors complete the report as soon as possible after the inspection. A delay in preparing the report can have a detrimental impact on the quality of the report and on the inspection process. Team leaders can encourage inspectors to draft their reports while still onsite or immediately after they return home. It is easier to remember key points and will ensure the task is completed outside of their normal work. JACIE will reimburse the costs of an additional night's accommodation if this facilitates writing the report.
An inspector has a delayed report (>2 weeks) post-inspection.	The AC sends a reminder email to the inspector and copies in the team leader to keep them informed. <i>It could be helpful for the team leader to write to the inspector and ask if any assistance is needed to complete the checklist/report.</i>
An inspector has a delayed report (>3 weeks).	The AC sends a second reminder and copies in the team leader to keep them informed. <i>The team leader could write again to extend an offer of help. It might be that the inspector has encountered some difficult issues upon return from the inspection.</i>

An inspector has a delayed report (>3 weeks < 8 weeks).	There are several steps the JACIE office takes to continue to reach out to inspectors to try and resolve any issues. The JACIE office will keep the team leader informed of the situation and the communication lines open.
An inspector has a delayed report (>8 weeks).	The JACIE medical officer will arrange to meet with the team leader to establish a plan: <ul style="list-style-type: none"> a. Review if the team is collectively able to finish the report b. Review if any parts of the checklist can be completed by the JACIE MO/Director of Advocacy and Quality of Care c. Review whether a focused re-inspection is required d. Email the centre to manage expectations and advise them of the reason for the delay

Table 4. Post inspection challenges before the JAC meeting

II. Reviewing the ‘Evidence of Corrections’

There are also times when the JACIE office might need the support of the team leader after the JAC meeting. This could be because a member of the team is late in submitting their review of the evidence of corrections provided by a centre. This will delay a centre being awarded accreditation.

Table 5 sets out how team leaders can help in these situations.

ISSUE	ACTION
An inspector delays reviewing the evidence of corrections provided by the centre (> 2 weeks).	The AC sends a reminder email to the inspector and copies in the team leader to keep them informed. <i>It could be helpful for the team leader to write to the inspector and ask if any assistance is needed to complete reviewing the evidence of corrections.</i>
An inspector delays reviewing the evidence of corrections provided by the centre (> 3 weeks).	If there is still no response after another week, the AC will send a second reminder and copy in the team leader to keep them informed.
An inspector delays reviewing the evidence of corrections provided by the centre (> 4 weeks).	There are several steps the JACIE office takes to continue to reach out to inspectors to try and resolve any issues. The JACIE office will keep the team leader informed of the situation and the communication lines open.

An inspector delays reviewing the evidence of corrections provided by the centre (> 8 weeks).	If the above steps do not help to finalise the report, the JACIE medical officer will arrange to meet with the team leader to establish a plan: <ul style="list-style-type: none"> a. Review if the team leader can sign off the corrections b. Review if any parts of the corrections can be signed off by the JACIE MO/Director of Advocacy and Quality of Care c. Review whether a focused re-inspection is required d. Email the centre to manage expectations and advise them of the reason for the delay
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Table 5. Post inspection challenges after the JAC meeting

5. Points for the team leader of a remote inspection

The role of the team leader during a remote and onsite inspection are very similar and the core responsibilities don't change. However, there are some additional considerations, and these are highlighted in Box 6.

- Team leaders must allocate more time than they imagine to the remote inspection because
 - They still need to conduct all the same meetings.
 - It takes longer to access documents remotely.
 - It takes longer to collate the queries and take these back to the whole team, especially when cross-referencing findings.
 - Face-to-face communication is missing in a remote inspection, and it is not possible to review any of the facilities or documents together. This means more interactions with fellow inspectors might be needed because you don't have the 'casual' conversations that might cover many topics.
- Picking up on non-verbal communication is more difficult in a remote inspection because
 - You can miss the 'truth' of a situation if you're not there in person e.g. what is the community like for the people who use the service. What is the 'real' experience of the centre for its staff and patients. More careful thought is needed to cover this aspect of the inspection.

Box 6. Considerations for the team leader of a remote inspection

6. Challenges

There are times when challenging situations might arise for team leaders, and some of these are described in this section. This is not an exhaustive list and team leaders should contact the JACIE office for further support or if there are any queries.

6.1. Handling non-compliances

People take a long time to prepare for inspections and it's important that if something is going to be highlighted as 'non-compliant', the inspector takes time to discuss this issue with the centre to really understand how the centre works.

If the inspectors find something unexpected, it's important to come up with a plan of how it will be managed. Often more severe non-conformities will go to the JACIE accreditation committee for adjudication. Sometimes issues are however 'softer' e.g. the role of the pharmacist in one hospital might be completely different to the role in the inspector's country and it might appear that the phrasing of the standard will leave the centre 'boxed in' and ultimately non-compliant. Inspectors should take time to understand how the service works and contextualise how the service is delivered in their reports for it to be considered by the JACIE accreditation committee. It's important not to rush to judgement and something might be compliant, even if it doesn't work exactly as in the inspector's centre.

6.2. Communication with centre staff

Team leaders can remind the team that words like agree, not agree, right, or wrong can provoke disagreements and unnecessary discussions. It helps to reiterate to the team and the centre that the inspectors are the 'eyes and ears' of JACIE, but do not have the final decision on awarding accreditation. The inspector should write what is heard and seen and, in some cases, can reassure the interviewee that their comments will be noted on the checklist.

Lengthy discussions can be distracting if they are not providing the answers to whether a standard is compliant or not. Team leaders can encourage inspectors (for onsite and remote inspections) to note these points down and ask the centre to provide the evidence that the standard is compliant. Anything that needs further clarification can be discussed with the programme director during the closing meeting.

6.3. Tricky standards

JACIE are international standards and there may be some ambiguity and there can be misinterpretation by the centre. It is here that the team leader can use their experience to guide why a standard might rather be applicable when the centre thought it wasn't. Similarly, the team leader might be in a good position to inform other inspectors through their experience about some 'tricky standards'. Team leaders are therefore ideally the most experienced member of the team with the widest knowledge.

6.4. Working through interpreters

One scenario which is more difficult than expected is when an inspection takes place through interpreters. Having inspectors that speak the language of the centre is beneficial but not always possible. It is easy for misunderstandings to arise, and this can be challenging to everyone involved. JACIE is an international organisation and English is the working language, but there are at least 20 languages spoken. It takes more time for inspectors to find evidence of the compliance if there is a language barrier and it can be even more difficult if the programme director does not speak English. It's important to understand what the centre 'really' means during these multilingual inspections when the centre and team of inspectors are possibly all working in a different language. Team leaders should consider strategies to avoid delays e.g., online translators, such as Google / DeepL translate can be effective solutions in some situations.

6.5. Breaking bad news

Breaking bad news', although unusual these days as there are very few centres still applying for first time accreditation, can be the most challenging part of an inspection. Team leaders must make sure these situations are handled professionally.

If the inspectors find something very worrying, it's important to come up with a plan of how it will be managed. It is helpful to provide some information during the inspection itself so that the centre is more prepared and won't be too shocked when they receive the report. This also allows them to think through the situation and provide solutions or clarify any misunderstandings.

Team leaders can also explain that non-conformities will go to the JACIE accreditation committee for adjudication.

6.6. Hybrid inspections

In this situation, part of the inspection team is onsite and one or more of the other inspectors are remote. In this situation, the team leader must ensure that the remote inspector(s) connect to the team meetings to be part of discussions. The team leader can view the recorded tour of the facility that the remote inspector will receive to ensure it is in keeping with the real situation. Other members of the inspection team can be asked to inspect areas 'in-person' if that would assist the remote inspector.

6.7. Unexpected findings

This is when the onsite situation is very different to what has been reported in the pre-audit documentation. For instance, the uploaded pre-audit documents are different to the ones the inspectors find onsite on the quality management system (QMS). The first recommendation is to remain calm. In this situation inspectors may feel that the time they spent reviewing the pre-audit documents was wasted. Despite this, it will be important to adapt to the situation and try to inspect the on-site situation and the new documents. It is important to inform the accreditation coordinator as the inspectors may need to review some of the documents just after the inspection and/or set a teleconference to complete the inspection.

6.8. Working culture in a centre

It is important to remain professional and neutral. The role of the inspectors is to make objective observations and findings against the standards. Inspectors should avoid commenting on any interpersonal issues observed between the centre staff during the inspection. The team leader might need to support other members of the team and ensure the JACIE office is notified if the situation is very difficult.

6.9. Informal communication by the centre directly with the team leader

One scenario could be that the programme director makes contact with the team leader after the inspection to complain. It is important to remain calm and politely inform the director that any complaints or queries must go through the JACIE office. The team leader should also inform the accreditation coordinator about what has happened as soon as possible so that they can manage the situation and provide support as needed. The team leader should not let it influence their impartial view of the findings.

6.10. A team member is not meeting the expected standard during an inspection

Ideally this is identified early, through good communication with the team, so that it does not come as a shock at the end when the report is not sufficiently completed. The team leader should check in with all the inspectors at regular intervals to make sure they are on top of things. If a performance issue is identified, the team leader could diplomatically offer to conduct interviews with the inspector to ensure all questions are answered. It will be important to cross-check that the inspector has picked up issues of concern that are relevant to their area that other inspectors have identified. The inspector will need support and the team leader will need to make use of the soft skills outlined in Box 2. The team leader should confidentially highlight their concerns to the JACIE office as soon as possible.

7.

Top tips

- **Don't be phased the first time you're asked to be the team leader** - it's a compliment and you can do it –so long as you get organised from the outset.
- **Be proactive to ensure the report is completed and the team submits their contributions.** It's a small amount of extra work, but worth it overall and turns a good onsite inspection into a great inspection experience for the team - there's nothing worse than unfinished work.
- **Before you leave the centre, make sure as much as possible has been completed on site and the team is aware of what they need to do over the next 2 weeks,** and how you will be checking in on them over this time. It's frustrating for the team leader (and JAC) to have to spend time fixing a poorly completed report and checklist. Team leaders must take responsibility to make sure this is done and reiterating the process to the team for the coming two weeks is important.
- **Include the accreditation coordinator in all correspondence** such as emails or WhatsApp messages to make sure they know what's happening and to avoid duplication of communication.
- **The team leader must remind the team that the inspection doesn't end at the end of the onsite inspection,** but only once the final versions of the summary report and checklist have been agreed by the team.
- **Make sure all the team members feel confident that they have managed to complete all the tasks they set out to do.** Check that they feel they've done a good inspection and are confident they'll be able to submit their individual reports on time.
- **Encourage team members to share with you as soon as possible if they are struggling to meet the submission timeline** - reassure them solutions can always be found but only if the problem is known about.

8. Contact

If team leaders have any questions, they should not hesitate to contact the JACIE office, who are there to help.

- For any queries about the team leader or inspector role contact the volunteers' coordinators at inspectors@ebmt.org
- For any queries about the inspection process contact the accreditation coordinators at jacie@ebmt.org
- There are also resources available at <https://www.ebmt.org/jacie-accreditation>

