



# Credentialing for Perioperative Nurse Leaders



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In the October 2015 issue of the *AORN Journal*, I wrote a Guest Editorial about emerging trends affecting nursing professional development and about the importance of “. . . developing new skills and areas of expertise that were not covered in prelicensure education. . . .”<sup>1(p325)</sup> One of those trends is a shift to greater individual responsibility for a nurse regarding lifelong learning. Nurses, including those in leadership and management roles, are faced with the need for ongoing professional development during the courses of their careers.

The need to develop new skills is of particular importance for perioperative nurse leaders in a time of rapid change. A key message from the Institute of Medicine (IOM) report *The Future of Nursing: Leading Change, Advancing Health* echoes the importance of ongoing education and lifelong learning: “The nursing profession must adopt a framework of continuous lifelong learning that includes basic education, academic progression, and continuing competencies.”<sup>2(p213)</sup> Recognizing this need, AORN has dedicated this issue of the *AORN Journal* to providing content on a variety of management- and leadership-oriented topics that are of interest to a wide range of perioperative nurses, including perioperative nurse leaders.

## EDUCATION PROGRAMS FOR PERIOPERATIVE NURSE LEADERS

Since 2009, the Competency & Credentialing Institute (CCI) has offered continuing education (CE) and a certificate of mastery program (Surgical Services Management) centered on management and leadership in the perioperative setting; they are available in the form of self-paced individualized learning combined with live presentations by subject matter experts.

This content was built on the foundation of a job analysis (ie, role delineation study) of the work performed by perioperative nursing leaders. A job analysis is “. . . designed to obtain descriptive information about the tasks performed in a job and the knowledge needed to adequately perform those tasks.”<sup>3(p7)</sup> The purpose of the job analysis, which was sponsored by CCI, was to “. . . develop and validate the listing of the tasks and knowledge related to work performed by professionals in the field of surgical services management” and to “. . . develop a body of knowledge for the Surgical Services Management education program.”<sup>3(p7)</sup>

The same rigorous process of job analysis supports certification examinations such as the CNOR credential, which is also administered by CCI. The certificate of mastery program includes a pretest to guide learning and a posttest to measure participant’s knowledge of the content taught in the course. These assessments are critical elements of the program. The assessment component and the job analysis foundation distinguish a certificate program from traditional CE activities. Through the job analysis, CCI monitors the nature of perioperative nurse leaders’ work and stays current with changes in that role.

In frequent interactions with the perioperative leadership community and through the job analysis findings, CCI learned that certificate of mastery programs are important and valued, particularly by those who are new to or aspiring to perioperative management. However, we also discovered unmet needs for the community of perioperative nurse leaders. Those needs were for additional formalized education and a certification examination based on the body of knowledge delineated in the job analysis. There is no standardized

educational program for perioperative nurse leaders working in the challenging OR setting. There is also a wide variety of educational and training processes used on entry into this role. The diversity of approaches contributes to a lack of consistency and leaves much room for improvement. Many perioperative nurse leaders develop a level of competency without a formalized course of instruction tailored to the unique demands of the field. This is often attained through an arduous process of “learning on the job,” a difficult method of competency attainment that may lead to a frustrating, error-prone career development process. A far more desirable option to learning on the job would be a well-structured program, perhaps augmented by additional academic coursework. However, these ideal types of learning paths are infrequent for perioperative nurse leaders and are typically found only in larger facilities and health systems.

These unmet needs led CCI to develop the Certified Surgical Services Manager (CSSM) certification program in 2015. The CSSM credential and its recertification mechanism address the identified gaps in the career paths for nurse leaders working in the OR setting. In addition, the CSSM credential further substantiates one of the career paths available to perioperative nurses.

## THE CSSM CREDENTIAL

The certificate of mastery program in Surgical Services Management represented an ambitious but early attempt to meet the need for additional quality education and training for the perioperative community. With the CSSM certification examination, there now exists a standardized test of the knowledge needed to lead and manage an OR. Although the test itself is a significant accomplishment, the strength of the credential and its value to the profession lie in the recertification mechanism.

The CSSM certification and recertification process is fundamentally different from the processes for other perioperative nursing certifications.<sup>4</sup> First, a nurse wishing to take the certification examination must substantiate recent learning activity (eg, CE or academic coursework on the subject matter covered on the test). This education must have been completed within the two-year period immediately before the nurse registers for the certification examination. This requirement substantiates recent learning in the field and some degree of current knowledge of the material that will be on the test.

Second, all nurses wishing to take the CSSM certification examination must have a minimum of baccalaureate-level

**Table 1. Certified Surgical Services Manager Certification Examination—Major Topic Areas**

|                                           |
|-------------------------------------------|
| Communication and Relationship Management |
| Operational Management                    |
| Leadership                                |
| Financial Management                      |
| Professionalism                           |
| Strategic Management                      |
| Human Resource Management                 |

education. This requirement establishes a common knowledge base for all test takers and reflects a known characteristic of the nursing community—that nearly 50% of nurses have graduate-level education.<sup>5</sup> This eligibility requirement is also consistent with the positions stated in the IOM *Future of Nursing* report regarding the need for additional academic preparation for nurse leaders.<sup>2</sup> The CCI fully supports this recommendation; the eligibility criteria for the CSSM credential and the recertification processes serve to support nurses who further their formalized academic education.

On passing the CSSM certification examination, each nurse receives a detailed score report relative to his or her performance on each of the seven major subject areas covered on the exam (Table 1) and a tailored professional development plan. Nurses who wish to maintain their CSSM certification have two options. They may retake and pass the certification examination or fulfill that professional development plan, which addresses deficits relative to the major subject areas found on the certification examination.

Figure 1 shows this CSSM recertification pathway in graphic form. To fulfill that customized plan, those holding CSSM certification must have access to quality CE materials aligned with their learning needs. This special edition of the *AORN Journal* can meet at least part of that need with content covering several of the domains found on the CSSM exam. The CE activities in this issue may also be used to meet the education requirements for CSSM eligibility.

## Continuous Professional Development

The CSSM certification examination and the information presented in the Surgical Services Management materials provide both the content to support lifelong learning and a mechanism by which to engage in ongoing professional development relevant to the role. In addition, these materials change the paradigm of learning for the nurse from a passive, directed

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