

## CSSM® Task & Knowledge Statements

### Subject Area 1: Communication and Relationship Management

#### **Knowledge Statements**

1. Negotiation techniques (e.g., win-win, building trust)
2. Emotional intelligence/quotient
3. Coaching and effective/timely feedback
4. Listening skills (e.g. active, deep)
5. Techniques for conflict and problem resolution (e.g., crucial conversations/confrontation)
6. Verbal and non-verbal communication
7. Computer literacy and etiquette (e.g., use of e-mail, word-processing and spreadsheet software, perioperative informatics and reports)
8. Team building and relationship management strategies
9. Culture of safety (e.g., environment where it is safe to speak up, just culture, stop the line)
10. Communicating with diverse groups (e.g., culture diversity, educational level differences, generational differences, flattened hierarchy)
11. Mission, vision, values, goals, what they represent and how they relate to the perioperative setting
12. Organizational culture, political factors and stakeholder identification
13. Assessment/evaluation techniques (e.g., patient and/or family, interprofessional healthcare providers)
14. Customer service (e.g., service recovery)

#### **Tasks**

1. Utilize negotiation skills in an interprofessional environment.
2. Establish and foster a collaborative relationship while understanding the differences among the disciplines (e.g., vendors/industry representatives; ancillary, management and professional staff).
3. Facilitate teamwork, cooperation and collaboration amongst all stakeholders throughout the continuum of care.
4. Evaluate the continuous improvement and effectiveness of relationship management within the perioperative departments (e.g., Central/Sterile Processing and OR) and between departments (e.g., PACU and Nursing Units).

5. Communicate organizational mission, vision, values and goals (e.g., decisions, plans, and activities) in a way that clearly links them to perioperative services.
6. Foster an environment that promotes openness, trust and a culture of safety (e.g., debriefing, checklists, hand-off reports).
7. Utilize technology and communication tools effectively, securely and appropriately (e.g., e-mail, messaging, images) to ensure patient privacy and regulatory compliance.

### *Recommended Reading*

Riley, JB (2020). *Communication in Nursing*, Julie Balzer Riley, 9th edition, Elsevier Mosby.

Daft, R. (2018). *The Leadership Experience*, 7th edition, Cengage Learning.

## **Subject Area 2: Strategic Management**

### **Knowledge Statements**

8. Process improvement techniques and tools
9. Elements of a strategic plan (organizational, facility and department level)
10. SWOT analysis (strengths, weaknesses, opportunities and threats)
11. Project management techniques
12. Capital requirements and long range forecasting
13. Master facility plan characteristics and requirements (e.g., FGI, OSHA, CMS)
14. Current and proposed federal, state legislation and regulations (e.g., Affordable Care Act (ACA), Certificate of Need (CON), CMS, scope of practice, FDA)
15. Accreditation requirements (e.g., TJC, DNV, AAAHC, AAAASF)
16. National advisory boards recommendations (e.g., Institute of Medicine (IOM), Citizens Advisory Council (CAC))
17. How to perform a gap analysis
18. How to write an action plan (e.g., SMART goals)
19. Requirements to meet organizational plan for recognition (e.g., Malcolm Baldrige Award, centers of excellence, ANCC Magnet)
20. Information technology impacts (e.g., EMR, hardware and software implications, employee preparation, readiness assessment, downtime procedures, system integration)
21. How and when to retrieve and use specific data

### **Tasks**

22. Plan, implement and evaluate process improvement programs (e.g., lean, six-sigma).
23. Develop and/or participate in a perioperative strategic plan (e.g., growth initiative, capital requirements).
24. Execute and/or manage a physical facility plan (e.g., space, equipment storage, throughput).
25. Contribute to organizational plan for external designations (e.g., Malcolm Baldrige, centers of excellence, ANCC Magnet).
26. Perform a gap analysis of perioperative services.
27. Develop action plans based on accreditation and regulatory survey results.
28. Analyze and respond to external factors that impact perioperative services (e.g., NHSN, Affordable Care Act, Medicare/Medicaid initiatives, surgical process measures, public reporting).
29. Contribute to, implement and manage organization's decisions related to technology initiatives (e.g., EMR, electronic interfaces).

### **Recommended Reading**

Roussel, L, Thomas, PL, & Harris, JL (2020). *Management and leadership for nurse administrators*. (8<sup>th</sup> edition). Jones and Bartlett Learning, Burlington, MA.

Albert, NM, Pappas, S, Porter-O'Grady, T, & Malloch, K. (2022). *Quantum leadership: Creating Sustainable Value in Health Care*. (6<sup>th</sup> edition). Jones and Bartlett Learning, Burlington, MA.

## **Subject Area 3: Financial Management**

### **Knowledge Statements**

30. Elements of capital, operating and staffing budgets and processes
31. Indicators to measure fiscal performance (e.g., efficiencies of operation)
32. Variance analysis (e.g., salary, temporary contract, non-salary)
33. Productivity (e.g., hours worked by staff compared to workload standard)
34. Cost concepts (e.g., direct and indirect, fixed and variable cost, procedure costing, allocated costs, overhead, depreciation)
35. Revenue concepts (e.g., return on investment (ROI), cashflow, margins, payor)
36. Information/ elements used to write a proforma
37. Inventory management, (e.g., markups, consignment, just in time, group purchasing organization, value analysis and standardization, implants)

38. Contracts and legal terms (e.g., standard business language, conflict of interest)
39. Techniques for environmental management (e.g., recycling, reprocessing, repurposing)
40. Benchmarks, key performance indicators (KPI), metric terminology and concepts (e.g., start time, turnover, block management, OR utilization)
41. Pay for performance (e.g., HCAHPS, value-based purchasing, readmissions, infections, serious reportable events)
42. Reimbursement codes (e.g., CPT, ICD)
43. Service line structure and management (e.g., cardiac, neurosurgery, gyn, plastic surgery, ambulatory surgery)
44. Current health care bills/laws affecting the perioperative financial environment (e.g., Medicare reimbursement)
45. Supply chain management

#### **Tasks**

46. Prepare and/or manage perioperative budgets (e.g., capital, operations, staffing).
47. Identify, develop and/or implement cost management strategies.
48. Develop, interpret and/or present perioperative financial reports.
49. Analyze variances and outcomes to create action plans.
50. Collaborate with supply chain management for the perioperative organization (e.g., par levels, order and inventory process).
51. Participate in the analysis of cost and revenue (e.g., per case margin, return on investment (ROI)).
52. Participate in revenue cycle management.
53. Collaborate to manage contracts (e.g., vendors, supplies, staffing, inventory, outside services, insurance).
54. Participate in computing cost-benefit ratios and developing proformas (e.g., new technology, new service lines, hybrid ORs).
55. Implement environmental sustainability initiatives (e.g., go green).

#### **Recommended Reading**

Baker, JJ, Baker, RW & Dworkin, NR (2018). *Health Care Finance: Basic Tools for Nonfinancial Managers* (5<sup>th</sup> edition) Jones & Bartlett Learning. Burlington, MA.

Penner, SJ (2017). *Economics and Financial Management for Nurses and Nurse Leaders* (3rd edition) Springer Publishing Company, New York, NY.

## Subject Area 4: Human Resource Management

### **Knowledge Statements**

56. Concepts of staffing models and how to evaluate the current environment to determine the most appropriate care model (e.g., staff type and ratio, theoretical model)
57. Work scheduling processes
58. Staff competencies in relation to work scheduling (e.g., acuity of the case, experience, availability, staff licensing privileges)
59. Human resource procedures and processes (e.g., writing a job description, hiring, performance evaluation, staff retention, staff incentives including pay and promotion, performance documentation, disciplinary actions including termination, grievance process)
60. Awareness of how to operate in a union environment, if applicable
61. Hiring techniques (e.g., interviewing, skills testing, team and culture fit)
62. Federal, state and local laws and regulations pertaining to human resources (e.g., FMLA, FSLA, workers comp, ADA)
63. Staff development (e.g., staff orientation and training programs, competency, educational opportunities, post-performance review goals and action plans, adult learning theory)
64. Policies for vendors and contracted employees (e.g., delivered equipment, product training, credentialing)
65. Benefits and compensation (e.g., EAP, grief counseling, substance abuse counseling, pay strategies such as pay for performance, clinical ladders)
66. Job requirements (e.g., licensure, certification, delineation of privileges)
67. Conflict management and resolution
68. Employee recognition strategies

### **Tasks**

69. Identify and continuously assess staffing models (e.g., techs, RNs, first assists).
70. Plan, schedule and assign work to staff according to on-going needs, skill set and scope of practice.
71. Describe and discuss with staff their job responsibilities, priorities, deadlines and performance expectations.
72. Recruit, hire, orient and retain perioperative personnel.

73. Participate in and/or conduct inter- and intradepartmental performance management.
74. Recognize effective performance and demonstrated competence (e.g., reward, recognition, “employee of the month,” pay increases, promotion).
75. Assign personnel and resources effectively to accomplish a special task or project.
76. Facilitate career counseling and support continuous professional development (CPD), lifelong learning and/or career advancement.
77. Establish and maintain appropriate job descriptions, evaluation tools and/or core competencies.
78. Oversee training and/or orientation process and programs tailored to individual needs assessment (e.g., residency, job-shadowing, on-boarding, cross training).
79. Develop a strategic plan for recruitment, retention and succession planning.
80. Monitor individual certifications/licenses and delineation of privileges required, and ensure that they are current (e.g., CNOR, RN, BLS, ACLS, provider credentialing).
81. Facilitate the constructive resolution of conflict (e.g., address behavior that undermines the culture of safety, lateral violence).

### *Recommended Reading*

McConnell, CR, (2019). *Human Resources Management in Health Care: Principles and Practices* (3rd edition). Jones and Bartlett Learning.

## **Subject Area 5: Operational Management**

### ***Knowledge Statements***

82. Risk management and interpretation of legalities (e.g., informed consent, HIPAA, minors, next of kin, durable power of attorney, emancipated minor)
83. Documentation requirements for report submission (e.g., compilation of data, surgical process measures, performance improvement, NSQIP, sentinel events, root cause analysis (RCA))
84. How to extract, interpret and use data
85. Facility policies, procedures and documentation for patient flow (throughput)
86. Clinical environment of care (e.g., temperature, humidity, air flow, HVAC, OSHA, EPA, traffic patterns)
87. Infection prevention (e.g., knowledge of Infection Control Risk Assessment (ICRA), disinfection, sterilization, hand hygiene, attire, isolation, appropriate skin antisepsis, cleaning, occupational exposure plan, MDROs)
88. Central/Sterile Processing guidelines (e.g., AAMI, AORN, etc.) relating to decontamination and sterilization of instruments, immediate use steam sterilization (IUSS), biological and chemical indicators, etc.

89. Equipment management process (e.g., preventive maintenance, consignment, loaner instrumentation, rental)
90. Laser, radiation, magnet and chemical safety (e.g., ANSI, OSHA, state requirements)
91. Standards, guidelines and recommended practices related to perioperative care and practice (e.g., AORN, ASPAN, SGNA)
92. Environmental emergency response and emergency management plans (e.g., internal and external disasters, emergency power, shut off valves, anesthesia, trace gas)
93. Inventory management concepts (e.g., expired items, par levels, rotation of stock, process for physical inventory, asset management)
94. Preference card management
95. Patient care across the continuum (e.g., flow of patient, needs of the patient, family issues, pre- and post-op planning)
96. Federal, state and local laws pertaining to compliance, accreditation and regulatory standards and requirements
97. How to write policies/procedures

### **Tasks**

1. Continuously assess and maintain safe conditions affecting patient care and the clinical environment of care (e.g., OR environmental controls, fall prevention, infection control).
2. Define and integrate departmental processes for emergency management with organizational processes (e.g., fire drills, natural disasters, surgical fires).
3. Collaborate with Biomedical Engineering to facilitate equipment maintenance and record keeping, according to manufacturer's instructions for use (IFUs).
4. Coordinate resources to match the OR schedule and patient needs (e.g., equipment conflict resolution, stock on hand, charge capture process).
5. Establish and maintain a preference card process.
6. Manage perioperative patient care across the health care continuum (e.g., patient information, pre-op testing and post-op care).
7. Aggregate operational data and information, analyze and prepare/submit reports, track trends, evaluate findings and make recommendations and/or improvements (e.g., productivity, cancellation rates, delays, start times, turnover time, OR utilization, block management).
8. Maintain compliance with requirements of regulatory, payor and accreditation agencies (e.g., TJC, FDA, OSHA, CMS, DOT, DNV, AAAHC).

9. Create, maintain and enforce policies and procedures based on current evidence-based practice.
10. Collaborate with Central/Sterile Processing to ensure departmental and patient needs are met.
11. Conduct risk assessments (e.g., root cause analysis (RCA), failure mode and effects analysis (FMEA), safety surveys) to address and prevent adverse events (e.g., wrong site surgery, malignant hyperthermia).

### *Recommended Reading*

Kaye AD, Fox CJ III, Urman RD, eds. (2019). *Operating Room Leadership and Management*. 2nd ed. New York, NY: Cambridge University Press.

Toussaint, J & Barnas, K (2020). *Becoming the Change: Leadership Behavior Strategies for Continuous Improvement in Healthcare*. McGraw Hill Education.

## **Subject Area 6: Leadership**

### ***Knowledge Statements***

1. Leadership styles
2. Group dynamics
3. Setting and implementing goals and evaluating goal achievements
4. Problem identification and resolution/crisis management
5. Appropriate delegation (e.g., what can be delegated, to whom it can be delegated)
6. Organizational structure and chain of command
7. Motivational techniques
8. Change management process and techniques
9. Coordination of ancillary support staff and equipment
10. Components of and resources for professional development (e.g., certification, organization practices and resources)
11. Advocacy for staff, patients, physicians, union, other departments (e.g., when to intervene)
12. Elements of an environmental scan and how to use the information
13. Meeting facilitation techniques (e.g., agenda preparation, redirection, Robert's Rules of Order, follow-up, minutes, committee charters)
14. Perioperative research and evidence-based practice
15. Employee engagement, process, scores and action planning

16. How to coach and/or mentor
17. Succession planning tools and techniques
18. How to identify and develop preceptors (e.g., skills required)

### **Tasks**

1. Provide direction to staff regarding task completion, including appropriate delegation.
2. Implement solutions and resolve crises.
3. Facilitate change by using motivational techniques/change management processes that generate enthusiasm, commitment and compliance, promote innovation and implement strategic initiatives.
4. Participate in organizational and/or facility level committees.
5. Perform an on-going environmental scan and utilize outcomes from engagement surveys to continuously improve the culture of the work environment.
6. Facilitate productive meetings and ensure adequate dissemination of meeting information.
7. Participate in projects serving as a leader or subject matter expert.
8. Facilitate effective mentoring

### **Recommended Reading**

Roussel, L, Thomas, PL, & Harris, JL (2020). *Management and leadership for nurse administrators*. (8<sup>th</sup> edition). Jones and Bartlett Learning, Burlington, MA.

Marquis, BL & Huston, CJ (2021). *Leadership roles and management functions in nursing: Theory and Application*. (10<sup>th</sup> Edition). Wolters Kluwer.

## Subject Area 7: Professionalism

### **Knowledge Statements**

1. Application of evidence-based practice
2. Ethics related to the continuum of care (e.g., AORN Explications for Perioperative Nurses, ASPAN Professional Guidelines, State Nurse Practice Act, ANA Code of Ethics, Code of Conduct, organizational)
3. Core elements of practice and standards for all disciplines in a perioperative setting (e.g., CST, CRNA, RNFA, CSFT, AA, RN, providers)
4. Professional organizations associated with the perioperative environment (e.g., CCI, AORN, ASPAN, IAHCMM, AST)
5. Medical volunteerism (e.g., mission trips, health fairs)
6. Shared governance
7. Self-assessment

### **Tasks**

1. Uphold and act upon established ethical and professional standards (e.g., perioperative explications of ANA Code of Ethics).
2. Conduct an on-going self-assessment and pursue professional development opportunities.
3. Maintain active involvement in professional organizations.
4. Foster a culture of mutual accountability and shared governance.

### **Recommended Reading**

Yoder-Wise, PS (2021). *Leading and Managing in Nursing*. (7th edition). Elsevier, Mosby.

Marquis, BL & Huston, CJ (2021). *Leadership roles and management functions in nursing: Theory and Application*. (10<sup>th</sup> Edition). Wolters Kluwer.