



## Study Plan

### References Cited in This Plan:

- AORN. (current edition). *Guidelines for perioperative practice*. AORN.
- AORN. (2021). Perioperative nursing: Scope and standards of practice. AORN. [https://www.aorn.org/docs/default-source/guidelines-resources/periop-nursing-scope-standards-of-practice.pdf?sfvrsn=c532cdee\\_1](https://www.aorn.org/docs/default-source/guidelines-resources/periop-nursing-scope-standards-of-practice.pdf?sfvrsn=c532cdee_1)
- Hornacky, A., & Phillips, N. (2024). *Berry and Kohn's operating room technique* (15<sup>th</sup> ed.). Elsevier. (Key=B&K)
- Rothrock, J. C. (Ed.). (2023). *Alexander's care of the patient in surgery* (17<sup>th</sup> ed.). Elsevier. (Key=Alexander's)
- AORN Position Statements and endorsed documents found at: <http://www.aorn.org/guidelines/clinical-resources/position-statements>

### Additional References/Management Textbooks:

- Huston, C. J. (2024). *Leadership roles and management functions in nursing: Theory and application* (11<sup>th</sup> ed.). Wolters Kluwer.
- Kaye, A. D., Urman, R. D., & Fox, C. J. III. (Eds.). (2019). *Operating room leadership and management* (2<sup>nd</sup> ed.). Cambridge University Press.
- Knighten, M. L. & Waxman, K. T. (Eds.). (2024). *Penner's economics and financial management for nurses and nurse leaders* (4<sup>th</sup> ed.). Springer Publishing Company.

Disclaimer: This is a guide to assist you in preparing for the CSSM exam. It is not intended to be all inclusive, but rather a guide to assist you in planning your study.

## Subject Area 1: Communication & Relationship Management (18%)

### Primary General Readings:

- Kaye, A. D., Urman, R. D., & Fox, C. J. III. (Eds.). (2019). *Operating room leadership and management* (2<sup>nd</sup> ed.). Cambridge University Press. – Chapters 1, 4, 5, & 6

Knowledge Statements	Tasks	Additional Readings
1. Negotiation techniques (e.g., win-win, building trust)	1. Utilize negotiation skills in an interprofessional environment.	<p>AORN Guideline</p> <ul style="list-style-type: none"> <li>Team Communication</li> </ul> <p>Hornacky, A., &amp; Phillips, N. (2024). <i>Berry and Kohn's operating room technique</i> (15<sup>th</sup> ed.). Elsevier. – Chapter 1</p> <p>The Joint Commission (TJC): <a href="#">TJC</a></p> <p>Riley, J. B. (2023). <i>Communication in nursing</i> (10<sup>th</sup> ed.). Elsevier.</p> <p>Daft, R. L. (2022). <i>The leadership experience</i> (8<sup>th</sup> ed.). Cengage Learning</p>
2. Emotional intelligence/quotient	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. Coaching and effective/timely feedback	3. Facilitate teamwork, cooperation, and collaboration amongst all stakeholders throughout the continuum of care.	
4. Listening skills (e.g., active, deep)	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. Techniques for conflict and problem resolution (e.g., crucial conversations/confrontations)	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. Verbal and non-verbal communication	6. Foster an environment that promotes openness, trust, and a culture of safety (e.g., debriefing, checklists, hand-off reports).	
7. Computer literacy and etiquette (e.g., use of e-mail, word-processing and spreadsheet software, perioperative informatics and reports)	7. Disseminate relevant information about decisions, plans, and activities to people who need the information.	
8. Team building and relationship management strategies	8. Create an environment that encourages a culture of safety,	

	openness, and trust.	
9. Culture of safety (e.g., environment where it is safe to speak up, just culture, stop the line)	9. Utilize technology and communication tools effectively, securely, and appropriately (e.g., e-mail, social media, texting/messaging, images).	
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 and political forces and how to stakeholder identification		
13. Assessment/evaluation techniques (e.g., patient and/or family; interprofessional healthcare providers)		
14. Customer service (e.g., service recovery)		

## Subject Area 2: Strategic Management (12%)

### Primary General Readings:

- Kaye, A. D., Urman, R. D., & Fox, C. J. III. (Eds.). (2019). *Operating room leadership and management* (2<sup>nd</sup> ed.). Cambridge University Press. – Chapters 3 & 30

Knowledge Statements	Tasks	Additional Readings
1. Process improvement techniques and tools	1. Plan, implement and evaluate process improvement programs (e.g., lean, six-sigma).	The Joint Commission (TJC): <a href="#">TJC</a>  DNV: <a href="#">DNV</a>
2. Elements of a strategic plan (organizational, facility and department level)	2. Develop and/or participate in a perioperative strategic plan (e.g., growth initiative, capital requirements).	Accreditation Association for Ambulatory Health Care (AAAHC): <a href="#">AAAHC</a>
3. SWOT analysis (strengths, weaknesses, opportunities, and threats)	3. Execute and/or manage a physical facility plan (e.g., space, equipment storage, throughput).	American Association for Accreditation of Ambulatory Surgery Facilities (AAAASF) QUAD A: <a href="#">QUAD A</a>
4. Project management techniques	4. Contribute to organizational plan for external designations (e.g., Malcolm Baldrige, Centers of Excellence, ANCC Magnet)	Institute of Medicine [IOM] (National Academy of Medicine): <a href="#">NAM</a>
5. Capital requirements long-range forecasting	5. Perform a gap analysis of perioperative services.	AORN Guideline <ul style="list-style-type: none"> <li>Product Evaluation</li> </ul>
6. Master facility plan characteristics and requirements (e.g., FGI, OSHA, CMS)	6. Develop action plans based on accreditation and regulatory survey results.	Albert, N. M., Pappas, S., Porter-O'Grady, T., & Malloch, K. (2022). <i>Quantum leadership: Creating sustainable value in health care</i> (6 <sup>th</sup> edition). Jones and Bartlett Learning.
7. Current and proposed federal and state legislation and regulations (e.g., Affordable Care Act (ACA), Certificate of Need (CON), CMS, scope of practice, FDA)	7. Analyze and respond to external factors that impact perioperative services (e.g., NHSN, Affordable Care Act, Medicare/Medicaid initiatives, surgical process measures, public reporting).	Carroll, R. (series ed.). (2011). <i>Risk management handbook for healthcare organizations. Vol 1</i> (6 <sup>th</sup> ed.). Jossey-Bass.
8. Accreditation requirements (e.g., TJC, DNV, AAAHC, AAAASF)	8. Contribute to, implement, and manage organization's decisions related to technology initiatives (e.g., EMR, electronic interfaces).	Klainberg, M., & Dirschel, K. M. (2010). <i>Today's nursing leader: Managing, succeeding, excelling.</i>
9. National advisory boards' recommendations (e.g., Institute of Medicine [IOM], Citizen's Advisory Council [CAC])		
10. How to perform a gap analysis		

11. How to write an action plan (e.g., SMART goals)		<p>Jones &amp; Bartlett Publishers.</p> <p>Roussel, L. A., Thomas, P. L., &amp; Harris, J. L. (Eds.). (2023). <i>Management and leadership for nurse administrators</i> (9<sup>th</sup> ed.). Jones &amp; Bartlett Learning.</p>
12. Requirements to meet organizational plan for recognition (e.g., Malcolm Baldrige Award, centers of excellence, ANCC Magnet)		
13. Information technology impacts (e.g., EMR, hardware and software implications, employee preparation, readiness assessment, downtime procedures, system integration)		
14. How and when to retrieve and use specific data		

## Subject Area 3: Financial Management (15%)

### Primary General Readings:

- Kaye, A. D., Urman, R. D., & Fox, C. J. III. (Eds.). (2019). *Operating room leadership and management* (2<sup>nd</sup> ed.). Cambridge University Press. – Chapters 8, 9, 16, 17, & 27
- Knighten, M. L. & Waxman, K. T. (Eds.). (2024). *Penner's economics and financial management for nurses and nurse leaders* (4<sup>th</sup> ed.). Springer Publishing Company. – Chapters 2, 3, 4, 5, 6, 7, 8, 9, 10, & 13

Knowledge Statements	Tasks	Additional Readings
1. Elements of capital, operating and staffing budgets and processes	1. Prepare and/or manage perioperative budgets (e.g., capital, operations, staffing).	<p>Baker, J. J., Baker, R. W., &amp; Dworkin, N. R. (2018). <i>Health care finance: Basic tools for nonfinancial managers</i> (5th ed.). Jones &amp; Bartlett Learning.</p> <p>Jones, C. B., Finkler, S. A., Kovner, C. T., &amp; Mose, J. N. (2019). <i>Financial management for nurse managers and executives</i> (5th ed.). Elsevier Saunders.</p> <p>Nowicki, M. (2022). <i>Introduction to the Financial Management of Healthcare Organizations</i> (8th ed.). Health Administration Press.</p>
2. Indicators to measure fiscal performance (e.g., efficiencies of operation)	2. Identify, develop and/or implement cost management strategies.	
3. Variance analysis (e.g., salary, temporary contract, non-salary)	3. Develop, interpret, and/or present perioperative financial reports.	
4. Productivity (e.g., hours worked by staff compared to workload standard)	4. Analyze variances and outcomes to create action plans	
5. Cost concepts (e.g., direct, indirect; fixed and variable cost; procedure costing; allocated costs; overhead, depreciation)	5. Collaborate with supply chain management for the perioperative organization (e.g., par levels, order, and inventory process).	
6. Revenue concepts (e.g., return on investment (ROI), cash flow, margins, payor)	6. Participate in the analysis of cost and revenue (e.g., per case margin, return on investment (ROI)).	
7. Information/elements used to write a proforma	7. Participate in revenue cycle management.	
8. Inventory management, (e.g., markups, consignment, just in time, group purchasing organization, value analysis and standardization, implants)	8. Collaborate to manage contracts (e.g., vendors, supplies, staffing, inventory, outside services, insurance).	
9. Contracts and legal terms (e.g., standard business language, conflict of interest)	9. Participate in computing cost-benefit ratios and developing proformas (e.g., new technology, new service lines, hybrid ORs).	
10. Techniques for environmental management (e.g., recycling,	10. Implement environmental sustainability initiatives (e.g., go	

reprocessing, repurposing)	green).	
11. Benchmarks, key performance indicators (KPI), metric terminology and concepts (e.g., start time, turnover, block management, OR utilization)		
12. Pay for performance (e.g., HCAHPS, value-based purchasing, readmissions, infections, serious reportable events)		
13. Reimbursement codes (e.g., CPT, ICD)		
14. Service line structure and management (e.g., cardiac, neurosurgery, gyn, plastic surgery, ambulatory surgery)		
15. Current health care bills/laws affecting the perioperative financial environment (e.g., Medicare reimbursement)		
16. Supply chain management		

## Subject Area 4: Human Resource Management (12%)

### Primary General Readings:

- Kaye, A. D., Urman, R. D., & Fox, C. J. III. (Eds.). (2019). *Operating room leadership and management* (2<sup>nd</sup> ed.). Cambridge University Press. – Chapter 2

Knowledge Statements	Tasks	Additional Readings
1. 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)	1. Identify and continuously assess staffing models (e.g., techs, RNs, first assists).	<p>McConnell, C. R. (2019). <i>Human resources management in health care: Principles and practice</i> (3<sup>rd</sup> ed.). Jones &amp; Bartlett Learning.</p> <p>Pynes, J. E., &amp; Lombardi, D. N. (2011). <i>Human resources management for health care organizations: A strategic approach</i>. Jossey-Bass.</p> <p>AORN Position Statements:</p> <ul style="list-style-type: none"> <li><a href="#">Perioperative Safe Staffing and On-Call Practices</a></li> <li><a href="#">Healthy Perioperative Practice Environment</a></li> <li><a href="#">Perioperative Registered Nurse Circulator Dedicated to Every Patient Undergoing an Operative or Other Invasive Procedure</a></li> <li><a href="#">APRNs in the Perioperative Environment</a></li> <li><a href="#">RN First Assistants</a></li> <li><a href="#">Role of the Health Care Industry Representative in Perioperative Settings</a></li> </ul>
2. Work scheduling process	2. Plan, schedule and assign work to staff according to on-going needs, skill set, and scope of practice.	
3. Staff competencies in relation to work scheduling (e.g., acuity of the case, experience, availability, staff licensing privileges)	3. Describe and discuss with staff their job responsibilities, priorities, deadlines, and performance expectations.	
4. Human resources 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)	4. Recruit, hire, orient, and retain perioperative personnel.	
5. Awareness of how to operate in a union environment, if applicable	5. Participate in and/or conduct inter- and intradepartmental performance management.	
6. Hiring techniques (e.g., interviewing, skills testing, team and culture fit)	6. Recognize effective performance and demonstrated competence (e.g., reward, recognition, “employee of the month,” pay increases, promotion).	
7. Federal, state, and local laws and regulations pertaining to human resources (e.g., FMLA, FSLA, workers comp, ADA)	7. Assign personnel and resources effectively to accomplish a special task or project.	



8. Staff development (e.g., staff orientation and training programs, competency, educational opportunities, post-performance review goals and action plans, adult learning theory)	8. Facilitate career counseling and support continuous professional development (CPD), lifelong learning and/or career advancement.	
9. Policies for vendors and contracted employees, (e.g., delivered equipment, product training, credentialing)	9. Establish and maintain appropriate job descriptions, evaluation tools and/or core competencies.	
10. Benefits and compensation (e.g., EAP, grief counseling, substance abuse counseling, pay strategies such as pay for performance, clinical ladders)	10. Oversee training and/or orientation process and programs tailored to individual needs assessment (e.g., residency, job-shadowing, on-boarding, cross training).	
11. Job requirements (e.g., licensure, certification, delineation of privileges)	11. Develop a strategic plan for recruitment, retention, and succession planning.	
12. Conflict management and resolution	12. Monitor individual certifications/licenses and delineation of privileges required, and ensure that they are current (e.g., CNOR, RN, BLS, ACLS, provider credentialing).	
13. Employee recognition strategies	13. Facilitate the constructive resolution of conflict (e.g., address behavior that undermines the culture of safety, lateral violence).	

## Subject Area 5: Operational Management (18%)

### Primary General Readings:

- Kaye, A. D., Urman, R. D., & Fox, C. J. III. (Eds.). (2019). *Operating room leadership and management* (2<sup>nd</sup> ed.). Cambridge University Press. – Chapter 9

Knowledge Statements	Tasks	Additional Readings
1. Risk management and interpretation of legalities (e.g., informed consent, HIPAA, minors, next of kin, durable power of attorney, emancipated minor)	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).	Association for the Advancement of Medical Instrumentation Standards [AAMI]: <a href="#">AAMI</a> (The book should be accessible in your SPD department.)
2. Documentation requirements for report submission (e.g., compilation of data, surgical process measures, performance improvement, NSQIP, sentinel events, root cause analysis [RCA])	2. Define and integrate departmental processes for emergency management with organizational processes (e.g., fire drills, natural disasters, surgical fires).	Centers for Medicare and Medicaid Services (CMS): <a href="#">CMS</a>
3. How to extract, interpret, and use data	3. Collaborate with Biomedical Engineering to facilitate equipment maintenance and record keeping, according to manufacturer's instructions for use (IFUs).	Occupational Safety and Health Administration (OSHA): <a href="#">OSHA</a>
4. Facility policies, procedures, and documentation for patient flow (throughput)	4. Coordinate resources to match the OR schedule and patient needs (e.g., equipment conflict resolution, stock on hand, charge capture process).	AORN Position Statement: <ul style="list-style-type: none"> <li><a href="#">Patient Safety</a></li> </ul> AORN Guidelines (examples include but are not limited to the following):
5. Clinical environment of care (e.g., temperature, humidity, air flow, HVAC, OSHA, EPA, traffic patterns)	5. Establish and maintain a preference card process.	<ul style="list-style-type: none"> <li>Electrosurgical Safety</li> <li>Environment of Care</li> <li>Environmental Cleaning</li> <li>Flexible Endoscopes</li> <li>Hand Hygiene</li> <li>High-level disinfection</li> <li>Information Management</li> <li>Instrument Cleaning</li> <li>Laser Safety</li> <li>Minimally Invasive Surgery</li> <li>Packaging Systems</li> <li>Patient Skin Antisepsis</li> <li>Patient Temperature Management</li> <li>Radiation Safety</li> <li>Sterilization</li> <li>Surgical Attire</li> <li>Transmission-based</li> </ul>
6. 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)	6. Manage perioperative patient care across the health care continuum (e.g., patient information, pre-op testing and post-op care).	

7. 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.	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).	<p>Precautions</p> <p>Related readings in the following perioperative textbooks:</p> <ul style="list-style-type: none"><li>Hornacky, A., &amp; Phillips, N. (2024). <i>Berry and Kohn's operating room technique</i> (15<sup>th</sup> ed.). Elsevier.</li><li>Rothrock, J. C. (Ed.). (2023). <i>Alexander's care of the patient in surgery</i> (17<sup>th</sup> ed.). Elsevier.</li></ul> <p>Kenney, C. (2011). <i>Transforming health care: Virginia Mason Medical Center's pursuit of the perfect patient experience</i>. Productivity Press, Taylor &amp; Francis Group.</p> <p>Toussaint, J., &amp; Barnas, K. (2021). <i>Becoming the change: Leadership behavior strategies for continuous improvement in healthcare</i>. McGraw Hill.</p>
8. Equipment management (e.g., preventative maintenance, consignment, loaner instrumentation, rental)	8. Maintain compliance with requirements of regulatory, payor and accreditation agencies (e.g., TJC, FDA, OSHA, CMS, DOT, DNV, AAAHC).	
9. Laser, radiation, magnet, and chemical safety (e.g., ANSI, OSHA, state requirements)	9. Create, maintain, and enforce policies and procedures based on current evidence-based practice.	
10. Standards, guidelines and recommended practices related to perioperative care and practice (e.g., AORN, ASPAN, SGNA)	10. Collaborate with Central/Sterile Processing to ensure departmental and patient needs are met.	
11. Environmental emergency response and emergency management plans (e.g., internal and external disasters, emergency power, shut off valves, anesthesia, trace gas)	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).	
12. Inventory management concepts (e.g., expired items, par levels, rotation of stock, process for physical inventory, asset management)		
13. Preference card management		
14. Patient care across the continuum (e.g., flow of patient, needs of the patient, family issues, pre- and post-op planning)		
15. Federal, state, and local laws pertaining to compliance, accreditation and regulatory standards and requirements		
16. How to write policies/procedures		

## Subject Area 6: Leadership (15%)

### Primary General Readings:

- Kaye, A. D., Urman, R. D., & Fox, C. J. III. (Eds.). (2019). *Operating room leadership and management* (2<sup>nd</sup> ed.). Cambridge University Press. – Chapter 1

Knowledge Statements	Tasks	Additional Readings
1. Leadership styles	1. Provide direction to staff regarding task completion, including appropriate delegation.	Huston, C. J. (2024). <i>Leadership roles and management functions in nursing: Theory and application</i> (11 <sup>th</sup> ed.). Wolters Kluwer.  Roussel, L. A., Thomas, P. L., & Harris, J. L. (Eds.). (2023). <i>Management and leadership for nurse administrators</i> (9 <sup>th</sup> ed.). Jones & Bartlett Learning  Vana, P. K., & Tazbir, J. (Eds.). (2021). <i>Kelly Vana’s Nursing leadership &amp; management</i> (4 <sup>th</sup> ed.). Wiley.
2. Group dynamics	2. Implement solutions and resolve crises.	
3. Setting and implementing goals and evaluating goal achievements	3. Facilitate change by using motivational techniques/change management processes that generate enthusiasm, commitment and compliance, promote innovation and implement strategic initiatives.	
4. Problem identification and resolution/ crisis management	4. Participate in organizational and/or facility level committees.	
5. Appropriate delegation (e.g., what can be delegated; to whom it can be delegated)	5. Perform an on-going environmental scan and utilize outcomes from engagement surveys to continuously improve the culture of the work environment.	
6. Organizational structure and chain of command	6. Facilitate productive meetings and ensure adequate dissemination of meeting information.	
7. Motivational techniques	7. Participate in projects serving as a leader or subject matter expert.	
8. Change management process and techniques	8. Facilitate effective mentoring.	
9. Coordination of ancillary support staff and equipment		
10. Components of and resources of 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)		

## Subject Area 7: Professionalism (10%)

### Primary General Readings:

- AORN. (2017). *AORN's Perioperative explications for the ANA Code of Ethics*. Found at [www.aorn.org](http://www.aorn.org), (member access only).

Knowledge Statements	Tasks	Additional Readings
1. Application of evidence-based practice	1. Uphold and act upon established ethical and professional standards (e.g., perioperative explications of ANA Code of Ethics).	Huston, C. J. (2024). <i>Leadership roles and management functions in nursing: Theory and application</i> (11 <sup>th</sup> ed.). Wolters Kluwer.  Yoder-Wise, P. S., & Sportsman, S. (Eds). (2023). <i>Leading and managing in nursing</i> (6 <sup>th</sup> ed.). Elsevier.
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)	2. Conduct an ongoing self-assessment and pursue professional development opportunities.	
3. Core elements of practice and standards for all disciplines in a perioperative setting (e.g., CST, CRNA, RNFA, CSFT, AA, RN, providers)	3. Maintain active involvement in professional organizations.	
4. Professional organizations associated with the perioperative environment (e.g., CCI, AORN, ASPAN, IAHCSMM, AST)	4. Foster a culture of mutual accountability and shared governance.	
5. Medical volunteerism (e.g., mission trips, health fairs)		
6. Shared governance		
7. Self-assessment		