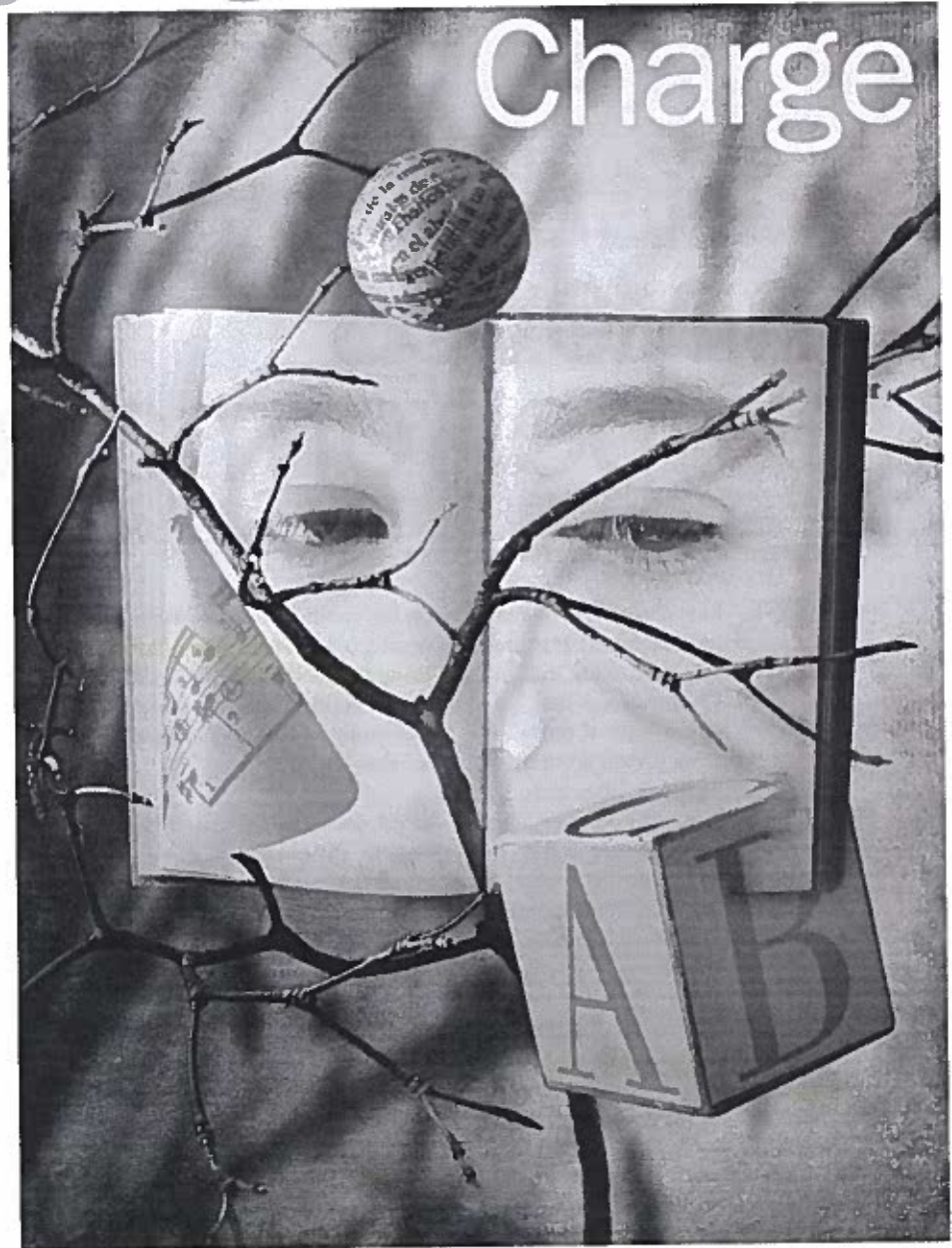


Making the grade:



Richard Tuschman

nurse education improves job performance

By Rosemary Homer, MBA, RN, and Linda Ryan, PhD, RN

Charge nurses are seen as the “go to” resource on the nursing unit. They manage the operations of the patient care area for a shift and, as such, their responsibilities include staffing, admissions and discharges, coordination of activities in the patient care area, conflict resolution, and facilitating resolution to patient complaints. It follows logically, then, that if the charge nurse isn’t adequately prepared to handle his or her countless responsibilities, then the unit’s workflow and patient care may be negatively impacted.

Direct care nurses are typically chosen to assume the charge nurse role because of their clinical expertise; often, little educational training or role clarification is given to those selected for this promotion. Nurses assume the role, but then may regret it because they feel ill-prepared.

We wanted to determine if a comprehensive, interactive charge nurse education course would increase charge nurse job performance and job satisfaction. This study focuses

on the creation, implementation, and results of a **Charge Nurse Education Program (CNEP)** that was started at the Adventist Hinsdale Hospital, a community hospital teaching facility, in Hinsdale, Ill.

What does the literature say?

Despite the pivotal role charge nurses play in unit operations, there’s been **limited research** done to examine how best to prepare and educate charge nurses to be successful. In the research that’s been published, there are competencies, skills, and traits identified as necessary for success in nursing leadership roles that are outside the realm of clinical skills.

Research has demonstrated that **emotional intelligence abilities are important to patient care, team relationships, and nurse self-care.**¹ Emotional intelligence abilities correlate with a wide variety of important workplace outcomes, including job satisfaction, conflict management, team performance, and psychological and physiological health.¹ Possessing emotional competence is

helpful to cope with stressful situations in which nurses often find themselves.

The research on charge-nurse-specific competencies is even more limited. One study defined competencies as the “expectations that professionals have for a particular role.”² The intent of this qualitative study was to identify skills associated with effective charge nurses; 54 competencies were identified. The study authors then grouped these into four categories: **clinical/technical, critical thinking, organizational, and human relations.** In addition to identifying these competencies, the study participants also revealed 15 characteristics an effective charge nurse should possess. These characteristics were composed of important interpersonal and attitudinal traits and didn’t include any clinical skills.²

A charge nurse workshop was developed based on the study, with an emphasis on human relation skills and critical thinking. An interactive teaching style was employed using realistic case scenarios for discussion and analysis.³

Another study highlighted 12 common qualities essential for effective charge nurses. These qualities were “competent and capable leader, self-awareness, skilled at

delegation, utilizes available resources, clarifies expectations, change agent, master at working through conflict, patient satisfaction and service recovery, patient safety and error prevention specialist, mentor, inspirational and resilient, and mission focused.”⁴

Additional research found more than 75% of ED charge nurses felt unprepared to do their job and were unsure of their job descriptions.⁵ The education department in this study developed charge-nurse-specific educational programs in which the expectations of a charge nurse in the ED was well-defined.

Critical thinking is another skill expected for charge nurses; however, teaching critical thinking can be a challenge. “For learning to be effective in enhancing nursing practice, it must occur in a context that is reality based, focused on the needs of the learner, and respectful of the knowledge and experiences the nurse learner brings to the educational setting.”⁶ The learning experience should be interactive and utilize adult learning principles. Providing lectures without including time for interaction, application, and practice won’t produce the desired outcomes.

Theoretical framework

The format and goals of our educational process reflected Dr. Jean Watson’s Caring Theory.^{7,8} The theory states that intentional caring is essential in creating healthy and healing work environments, and that caring is a moral and ethical foundation for clinical and administrative nursing practices.^{7,8} Our CNEP promoted the awareness of caring as a component of a healthy work environment and helped to develop caring, healthy, respectful human-to-human relationship skills through discussion, role playing, and reflection. The concept of caring isn’t limited to the nurse-patient relationship. How nurses relate to each other often sets the tone of nurse-patient relationships. The basics of trust, compassion, and empathy must be extended to coworkers to develop a work environment that embodies those values and channels them to patient care.

The educational program content developed for this study included a large component related to one’s **self-awareness of communication styles.** Gaining insight into how one’s own behavior impacts others is the first step in improving respectful interactions with colleagues and patients. Throughout the entire program, these concepts were applied to improve the leadership skills of the participants and to help develop a work environment of caring.

Establishing program content

Before we developed the CNEP, **focus group sessions were facilitated with charge nurses and the nurse leadership team, separately, to attain insight into necessary course content.** Questions were asked related to perceptions of job expectations, performance, and

Table 1: Focus group questions

Questions for managers/directors	Questions for charge nurses
What are your expectations for the charge nurses?	What’s expected of you as the charge nurse?
What behaviors do you see?	How are you doing in comparison to the expectations?
How does staff see the charge nurse role?	How does staff see the charge nurse role?
How are charge nurses treated by their colleagues?	How are you treated by your colleagues?
What skills do you want them to learn?	What skills do you want to learn to help you do your job better?

skills needed as a charge nurse. (See Table 1.) The responses for both groups were collated and used as a guide to develop the curriculum. In general, both groups saw significant room for improvement in the charge nurse role.

The nursing leadership group and the charge nurses were closely aligned in their views of what skills were necessary for the charge nurse role. Many of the competencies identified were mentioned in our literature review. (See Table 2.)

As previously discussed, the core of this CNEP course was self-awareness of communication styles, a tenet of emotional intelligence. Developing self-awareness using a reliable tool to identify behavioral styles formed the foundation for this 2-day course. Communication is integral to leadership skills needed to succeed in the charge nurse role and is a common thread identified in the literature.¹⁴

We used the case study approach to teach the CNEP. Cases were discussed in small groups allowing for participation by all. Problem solving was generated during these interactions. The educational content and methods were reality-based. Using case studies reflecting issues nurses actually deal with was helpful because participants could spend class time practicing how to handle real situations and identifying what action steps were needed.

After the educational program content was created, the CNO and the nurse leadership team attended a session to learn about their own communication styles and obtain an overview of the education the charge nurses would receive. This session was intended to assist the leadership team in their supportive role of the charge nurse in the practice setting.

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Table 2: Identified skill set

Skills listed by managers	Skills listed by charge nurses
Conflict management	Conflict management
Coaching (feedback)	Feedback
Performance management	Performance management
Customer service	Customer service
Communication	Communication
Time management	Prioritizing/organizational skills
Delegation	Delegation
Budgeting	
Change management	
Critical thinking	

This study was reviewed and approved by the regional institutional research review board. A pre- and postintervention design was utilized, using two versions of a charge nurse job performance and satisfaction survey: one version to measure the charge nurses perception of their own job performances and satisfaction, and a second version to measure the manager/directors' perceptions of their charge nurses job performances and satisfaction. After informed consent was obtained, participants were asked to complete the baseline (pre)survey at the beginning of their educational session, before any course content was presented.

Six weeks after the CNEP, post-surveys were mailed to each charge nurse who attended the program and to each manager/director whose charge nurse attended the program. Participants returned completed surveys to the research investigator. In total, 60 charge nurses were invited to complete the pre- and postsurveys. The CNEP itself was a 2-day intensive program. Charge nurses received 16 hours of education, and nurse managers received 4 hours.

Quantitative data analysis

The job performance and satisfaction survey consisted of 13 items scored on a Likert scale ranging from 1 (not at all) to 4 (great extent). Cronbach's alpha tests were performed on the charge nurse survey version pre- and posttraining, and then on the manager/director survey version pre- and posttraining (alpha = 0.91, 0.89, 0.91, and 0.87, respectively).

Sixty charge nurses attended the educational sessions, 57 of whom completed the pretraining survey (95% response rate). First we asked the 57 participants about their years of experience in nursing. (See Figure 1.) Then we asked about their years of experience as charge nurses. (See Figure 2.) Seventy-five percent of these charge nurses reported that they had received no previous education specific to their charge nurse role. Of the 14 (25%) nurses who reported that they did receive charge-nurse-specific education, they cited a variety of educational sources, including leadership classes (as part of an academic and nonacademic program), management conferences, online continuing education, and unit-specific orientation. Thirteen managers/

directors were invited to complete the pretraining survey, with a 100% response rate. No demographic data were obtained from this group.

Twenty four of the 60 charge nurses completed the posttraining survey (40% response rate) and 5 of the 13 managers/directors completed their posttraining surveys (38% response rate).

The ratings for the 13 job performance and satisfaction survey items were summed to attain composite scores. One charge nurse presurvey was excluded due to incomplete data. Independent sample *t*-tests were performed on the composite scores to analyze if there were significant differences between the charge nurses' perceptions of their job performance and satisfaction, compared with their manager/directors' perceptions. Before the charge-nurse-specific education, the charge nurse perception of their job performance and satisfaction scored statistically significantly higher than

the manager/director perception, $t(67) = 4.46, p = 0.000$. Following the charge-nurse-specific educational sessions, no statistically significant differences were found between the charge nurse and the manager/director perceptions of charge nurse job performance and satisfaction, $t(27) = 1.72, p = 0.10$.

Independent sample *t*-tests were also performed to analyze whether there were differences in perception of job performance and satisfaction before and after the charge-nurse-specific educational sessions. Both the charge nurse perception and the manager/director perception of job performance and satisfaction showed statistically significant increases following the charge nurse education sessions, $t(78) = -2.64, p = 0.01$; $t(16) = -2.92, p = 0.01$, respectively. (See Table 3.)

Qualitative analysis

Comments from the posttraining survey question "What changes have

you seen in performance since the charge nurse education classes?" were transcribed verbatim and then read by the researcher to identify themes. Four themes of performance changes emerged:

1. Increased awareness of personality types and how they affect communication. Charge nurse comments included such statements as:

- "I have developed a clearer understanding of my coworkers' needs as a result of the personality profile. This has improved my communication skills with others based on the ability to focus on what's important to them."

- "I communicate differently to meet each individual's personality type."

- "I can see what personalities others have and how I should approach and speak to them."

2. Improved conflict resolution skills. Charge nurse comments included such statements as:

Figure 1: Charge nurse years of nursing experience

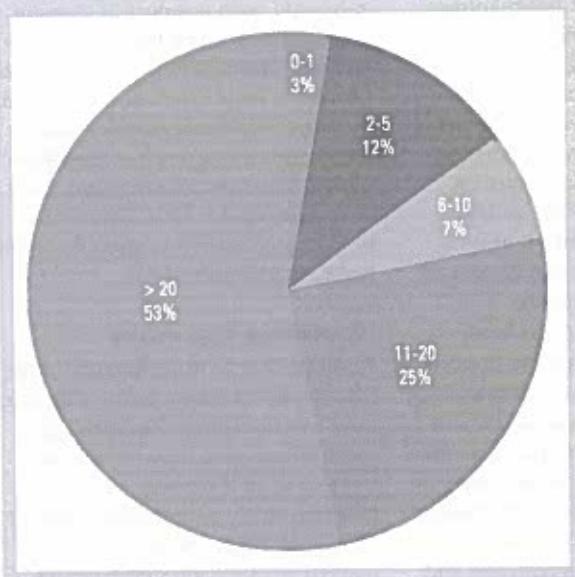
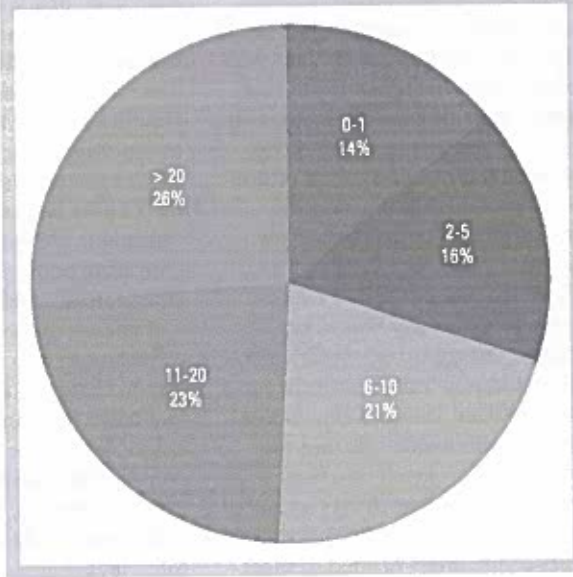


Figure 2: Years of charge nurse experience



- "I have increased confidence to intervene and handle conflicts."
- "I'm becoming more comfortable with giving constructive feedback when there are issues."
- "I feel more confident addressing issues with staff."

3. Improved delegation skills.

Charge nurse comments included such statements as:

- "I feel more confident doing assignments."
- "I feel more confident to delegate tasks to staff."

4. Intentionally creating a caring, healthy work environment. Charge nurse comments included such statements as:

- "Helping to collaborate better with my coworkers so they all get along and we start turning negativity into a more positive thing."
- "I understand my personal style and how it affects others. I understand other personality traits so I can learn how to better communicate and work with them."

CNEP gets an A+

The charge nurse role requires a management skill set that many charge nurses don't have due to a lack of proper education. As a result, they often feel frustrated; they may feel that they're failing at their job despite their best efforts to succeed. **Role expectations lack real clarity, and little if any role-specific education is provided to develop the leadership skill set necessary for success.**

Seventy-five percent of charge nurses in this study had never received charge-nurse-specific education. Despite these nurses having significant years of experience, many communicated during the educational program that they didn't perceive themselves as having the authority to take the appropriate action steps needed to meet

Table 3: Sample size and mean composite scores pre- and postCNEP

	PreCNEP		PostCNEP	
	n*	Mean	n	Mean
Charge nurse	56	40.71	24	44.75
Manager/director	13	31.77	5	40.40

*n = participants

the job expectations. This may be part of the reason so many nurses have expressed dissatisfaction with the charge nurse role and a reluctance to step into the role.

Awareness of behavior styles and their impact on others seems to be a crucial piece to the foundation for improving performance levels and creating a caring environment. Assuming charge nurses already possess sound clinical skills, it becomes evident that the additional skills needed revolve strongly around interpersonal skills that build relationships and positive, constructive interactions with colleagues.

Since the education sessions, anecdotal feedback received from managers and charge nurses has been very positive. Charge nurses have said that they now call their managers describing what they've done instead of asking what they should do. They have a better sense of the "bigger picture"—focusing less on themselves and more on their entire teams. These positive comments are evidence that this education had a positive impact on charge nurse performance.

If charge nurses understand expectations, are given the opportunity to build the appropriate skills, and learn them in an environment where they feel safe to practice, this helps build confidence and satisfaction in their jobs. The use of reality-based case studies, discussion, and role playing enhances learning and

the participants' abilities to apply learned concepts. When charge nurses adapt their communication styles appropriately, it leads to more caring behaviors and improved relationships. When charge nurses are aware of their own communication style and how their style impacts others, they're able to intentionally relate to their coworkers in a more sensitive way, creating a more caring environment for all.

Education is a process, not a single event. Gaining input and support from nursing administration, nursing management, and staff members increases the validity and credibility of any education program. The effectiveness and application of education were definitely enhanced with support of nursing administration and the nurse management team. When the education process is supported and embraced by nurse leaders, it demonstrates the charge nurse's value. Developmental educational programs are a way to recognize that value and help charge nurses acquire the skills needed to be successful.

Maintaining high marks

Without charge-nurse-specific education, nurses promoted to this role may feel unprepared to meet job expectations and may be seen as ineffective in the position. This research study explored the impact of charge-nurse-specific education on charge nurse job performance

and satisfaction. Statistically significant increases in the perception of charge nurse job performance and satisfaction were shown after the implementation of the education program; these increases were found for both charge nurses and their managers/directors. Promoting clinically excellent direct care nurses to a charge position doesn't ensure their success, but providing them with the education and resources they'll need certainly improves their chances of becoming competent and successful within their role. **NM**

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