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Thinking Outside the Box: Perioperative Preceptorship

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One of the more important transitions of adult life occurs when facing the challenges of a new job in a new setting. This experience is stressful in both positive and negative ways. Yet we know very little about the process. As the months turn into years the new employees become as comfortable as an old pair of PJs and we forget about those awkward first few months.

It is not new for perioperative education specialists to be facing challenges when orienting new staff to the perioperative unit. These challenges result from diversity in language and culture, skill mixes (such as RN's, RPN's and non-licensed scrub techs), diversity in language and cultures, varied work values, and the rapid advancement of technology in surgery. In recent times, it has become almost impossible to meet the needs of newcomers in the old orientation structure. There is constant change in nursing – and perioperative nursing is

no exception. Some examples of these changes are increased patient acuity, shortened length of surgical stays, and increased role responsibilities due to the flattening of the nursing hierarchy. These changes, although very positive in some cases, have caused a destabilization and disruption to the traditional perioperative nursing orientation models. In light of these changes, Mount Sinai Hospital's Perioperative Unit has begun to research and experiment with alternate ways of envisioning orientation.

In the context of learning, this new preceptorship model provides enhanced availability of support for the newcomer. The orientation model's goal is the integration of new staff in to any department at a pace that is specific to the newcomer's needs (refer to figure 1). Mount Sinai's perioperative preceptorship model mixes the realities of both the clinical and the theoretical components of perioperative nursing experiences. In addition, this model uses the adult learning principles (andragogy) as well as nursing organizational and development

Figure 1



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Thinking Outside the Box (cont.)



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theories to support the design. The proposed model consists of six phases:

- 1 - **Organizational Entry:** Welcome Aboard
- 2 - **Bureaucratic Role Conceptions:** The New Reality
- 3 - **Professional Role Conceptions:** Finding a Good Fit
- 4 - **Achieving Role Competency:** Pre-Consolidation
- 5 - **Role Transition:** Consolidation
- 6 - **Mutual Acceptance:** Post-Consolidation

The following excerpt is an example of one staff member's initial experience.

"The hospital hired seven of us from our graduating class. We all started roughly around the same time, perhaps a few weeks apart. We were so glad that we had finally retained a perioperative nursing position and sequentially we were going to be earning a salary. We were so ecstatic. The orientation was vigorous and perhaps too fast for our learning needs. We all suffered high levels of anxiety and returned home after work with huge stress migraines. It was perhaps worth it in the end. We are all perioperative nurses and have contributed to the perioperative team for about eight years now. Hindsight, I do wish things could have been done differently. I can only remember the feeling of being stressed more times than I care to remember. I found learning perioperative nursing was just different. In the last year, we have hired a bunch of new staff. I wonder how they are feeling?"

This story may ring true to you. What is disconcerting is that the story raises a question about the successes and failures of our workplace socialization.

As a start, healthcare employers must look beyond immediate recruitment and retention challenges to view the needs of the current

healthcare workforce as a long-term investment. From this perspective equal attention must be given to the development and utilization of the existing human resources and to filling immediate staff shortages and engaging in succession planning. *American Review of Sociology* (1999) states that "nursing studies consistently report that autonomy, improved communication and respect are positively associated with job satisfaction, recruitment and positive assessments of the work environments" ¹

For the purpose of clarification and defining the domain of organizational socialization this article uses the definition of socialization by Feldman as the "process by which outsiders of organizations become transformed into effective and fully participating members" ². While socialization is often an ongoing and lengthy process, I have focussed my attention on the socialization processes that occur within the first year of the newcomer's entry, when the impact and salience of socialization activities are the greatest ².

ORGANIZATIONAL ENTRY

Welcome Aboard

The first stage in the model is the *Organization Entry*. This stage encompasses all of the learning that occurs prior to the newcomer's first day on the job. For example, newcomers would be exposed to varied personnel, such as the manager and the educators, and a range of specialties and staffing skill mixes within the department. The basic idea is that socialization begins even before newcomers arrive into the organization. By this time, newcomers have formed expectations of the new organization, the department and subsequently the new job. They arrive with a heightened sense of curiosity, excitement and a readiness to learn the ropes.

Before the enthusiastic newcomers take hold of the new work environment, (and in order to provide the structure within which learning takes place for each newcomer - commonly known as the learning plan) they must understand the organization itself. There are

Thinking Outside the Box (cont.)

several sources of insider knowledge within the employing organization. These include:

the tenured staff;
managerial discussions;
human resources;
and public relations.

These resources are the key to harnessing newcomers' enthusiasm and their quest to embrace the new organization.

BUREAUCRATIC ROLE CONCEPTIONS

The New Reality

The second period, is the *Bureaucratic Role Conceptions*. This phase exposes newcomers to the organizational structure and their roles within that organization. Newcomers begin to understand the long-term view of the organization and the new job. The organization shares its values, history and expectations of their staff (within the context of the organization). It is where the reality of the new organization meets the reality of newcomers.

At any stage of professional socialization newcomers can choose to leave the organization for numerous reasons. In this model, one reason would be '*reality shock*'. Reality shock, coined by Schein, is a phenomenon that may occur due to the disparities between the lofty expectations of the newly hired and the realities of everyday organizational life³. Both newcomers and the organization have a large role to play in decreasing the level of stressors newcomers may experience. It is imperative that the organization and the subsequent employing department approach newcomers honestly, without over selling or over inflating the organization, department and its members. The length of this stage is still unknown, but research done by Davis suggests it lasts for the first 6-9 months on the new job⁴.

PROFESSIONAL ROLE CONCEPTIONS

Finding A Good Fit

Professional Role Conceptions begins with

newcomers learning their role within the employing department. At this stage, the individual determines whether there is a professional and organizational fit. This fit is not judged solely on the newcomer's work abilities and roles, but also in terms of the culture and climate of the organization. Once again, if there are disparities between the expectations and the realities of the organizational life, coupled with a high level of newcomer stress and anxiety, then resignations may occur. During this period, newcomers are most receptive to insider's influence. A concerted effort to maintain open lines of communication is imperative because communication minimizes the effects of "reality shock".

ACHIEVING ROLE COMPETENCY

Pre Consolidation

The first step in achieving role competency is referred to as the *Pre-Consolidation* stage. This stage begins within the employing department. During this phase newcomers begin to define their role within the department. Newcomers start to identify the necessary activities for successful role socialization. It is during this period that newcomers meet their preceptor and the tenured staff. At this time, there is a heightened exchange of information. Newly hired nurses arrive with several questions specific to understanding their role within the new department. Such questions can be related to policies, procedures, ordinary daily routines, historical events, or rumors about the department and organization. Newcomers are *making sense* of this new knowledge, and in doing so, increasing their own understanding of the department/working cultures, their role as newcomers and the organization itself. Pre-consolidation continues until full saturation of the new working environment, job roles and expectations are competently achieved.

The intense contact with newcomers in the new working environment (such as the perioperative unit) serve to strengthen the morale of all

involved staff. It is during this crucial stage that clarification of values is revealed. The similarity of attitudes and behaviors among the working staff may become more salient, thereby increasing the frequency and positiveness of the interactions. During the pre-consolidation stage the staffing ratio is 1:2 (newcomer: tenured staff). This period provides newcomers with an opportunity for planning and reflection, which promotes self-directed learning opportunities. It is also seen as an integral component to 'learning the ropes' within the organization and the employing department.

Flexibility is, of course, the key to success, both in meeting the needs of new staff and the needs of the organization. The newcomer's learning needs can be met by providing appropriate learning resources suited to a variety of learning styles. Additionally, to enhance learning and decrease possible high levels of stress/anxieties, newly hired nurses will rotate into surgical services that they themselves have identified as areas where they require the most experience. This process moves newcomers from the most comfortable surgeries to the least familiar.

During pre consolidation, newcomers may be temporarily performing important job functions considerably less often than their colleagues. Therefore regular progress evaluations, feedback from preceptors/professional colleagues, and needs assessments are fundamental to a newcomer's success.

ROLE TRANSITION

Consolidation

Consolidation is the most important stage to achieving successful socialization of newcomers. During this stage both the newcomers and the organization experience a '*trial run*'. The trial run allows newcomers to 'consolidate', or apply, their new and existing knowledge and responsibilities to the new role while under minimal supervision. Newcomers are allowed to function as participants on their own terms. At this stage, perioperative nurses are given an opportunity to work in surgical ORs, where

they have already been successfully rotated. This grants them the opportunity to be supported in services where they are the most comfortable. At this stage newcomers would have rotated through only 50% of all clinical specialties.

The rules for consolidation are as follows:

Newcomers will:

- work day shifts;
- not float or be utilized as swing/pod personnel;
- work with competent and expert nurses (by Benner's definition);
- work in the surgical services where they have rotated successfully;
- be required to function fully within those successfully rotated areas;
- and receive regular feedback.

As newcomers consolidate, they are expected to function as contributing team members alongside preceptor/veteran staff. The ratio of staff is now 1:1 (veteran: newcomer) and this arrangement forms the new staffing mix. There is limited direct supervision. This phase provides a '*win-win*' situation for both the department and its members. Newcomers are given the opportunity to expand their knowledge base, and apply it to real life, as well as expanding their new roles and responsibilities. Newcomers develop a gradual sense of 'insidership', increased self-esteem and the ability to feel that they are participating in achieving their goals. The basic principle behind this period is to ensure that newcomers can successfully demonstrate early successes in areas that are small enough to be achieved, but significant enough to excite enthusiasm. This fosters newcomers' development and transition into the new working group. The length of time an individual spends in the consolidation phase varies depending on their needs.

The consolidation period holds shared responsibilities for both newcomers and the organization. The employing department evaluates newcomers' performances, growth, and development during the first 2-6 weeks

Thinking Outside the Box (cont.)

of their consolidation. Newcomers must demonstrate to the employing department that the new position is a good fit and that the department has made a good hiring decision.

REFINEMENT OF ROLES & VALUES: MUTUAL ACCEPTANCE

Post Consolidation

The final stage in this model is the *Post Consolidation* phase. During this phase, newcomers are placed back into the intense learning mode where unfinished role functions and remaining responsibilities and experiences are assumed. The newcomers now make the transition to fully understanding and functioning in their new roles. They are aware of the need to be committed to their jobs. During this phase newcomers are slowly validating both their new roles and their previous work experiences. They take advantage of opportunities to analyze the strengths and weaknesses within the department. During this phase newcomers can provide valuable and unfiltered feedback about departmental functions. Likewise, newcomers have a better understanding of the new working group and may be able to unfreeze old behavioral routines. This final period is complete once 100% of the roles and responsibilities in the new position are successfully achieved.

Since the first year of employment is the most crucial for both newcomers and the organization, regular informal debriefings are recommended. These debriefings (held once every 2-3 months) should include departmental management representatives and all other discipline related newcomers. Debriefings should serve as forums for follow-up/feedback, job clarification, and workplace enhancement opportunities.

The Mount Sinai Perioperative Preceptorship model is an innovative approach to socializing newcomers, such as newly hired perioperative nurses, into a work environment that is more tailored to the individual's learning needs. Through the newcomer's progression and successive steps, successful socialization of the newcomer

is achieved. Moreover, at a conceptual level, this socialization gained by the newcomer provides additional long-term benefits such as self-efficacy, control over the working environment, flexible behaviour, innovativeness, and organizational citizenship.

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