Primary Investigator

Identifying Performance Criteria for Staff Development Competencies – Study 9

Barbara A. Brunt, MA, MN, RN, BC
Director, Nursing Education and Staff Development
Summa Health System
41 Arch Street
Akron, Ohio 44304

Work (330) 375-3075
Fax (330) 375-7966

E mail: bruntb@summa-health.org
Home: (330) 245-0058
Abstract

Identifying Performance Criteria for Staff Development Competencies – Study 9

Barbara A. Brunt, MA, RN, BC
Summa Health System
Akron, Ohio

Background - This study will continue the work initiated with a pilot study on identifying performance criteria for staff development competencies. The pilot study built upon the previous research of a collaborative task force involving the National Nursing Staff Development Organization (NNSDO) and the American Nurses Association (ANA) Council for Professional Nursing Education and Development, hereafter referred to as the ANA Council. This group identified 63 advanced practice competencies for staff development (SD) practice. These competencies were grouped into factors describing various domains. Factor I, which accounted for 33% of the variance, dealt with relationships with others and the organization.

Methods - The pilot study examined 10 competencies with the highest means in Factor I and identified performance criteria for both subjective and objective competency statements. The proposed study will use the same methods as the pilot study and continue to develop performance criteria for the remainder of the advanced practice competencies identified by the joint task force, as well as basic competencies developed by the primary investigator. The primary investigator will define terms as needed and then will develop performance criteria for the objective statements.

Sample - A random stratified sample of certified staff development specialists will be asked to validate the performance criteria developed by the primary investigator and also identify performance criteria for the subjective statements. The primary investigator will do a content analysis on the feedback from the participants, developing performance criteria for the subjective statements and retaining or eliminating performance criteria for the objective statements. The revised performance criteria for both the objective and subjective competencies will be sent to a small group of staff development educators from selected NNSDO affiliate groups for a second evaluation.

Analysis - Comparison of the ratings of the two groups will validate the highest-ranking criteria.

Relevance - This study will provide a comprehensive description of staff development competencies and performance criteria. These can be used or adapted by institutions, staff development specialists, or organizations to determine if staff development educators are meeting those competencies. This study will provide a consistent, validated tool to assist with self-assessment, identification of specific behavioral expectation, or performance evaluations for staff development educators. This will in turn advance the specialty of staff development practice by further describing and providing measurable criteria to define staff development practice.
### Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem Statement</td>
<td>1</td>
</tr>
<tr>
<td>Background and Significance</td>
<td>2</td>
</tr>
<tr>
<td>Research Design and Methods</td>
<td>7</td>
</tr>
<tr>
<td>Budget</td>
<td>18</td>
</tr>
<tr>
<td>Timeline</td>
<td>19</td>
</tr>
<tr>
<td>References</td>
<td>20</td>
</tr>
<tr>
<td>Appendix I – Competencies of Staff Development Educators – Personal Assessment of Competency</td>
<td>22</td>
</tr>
<tr>
<td>Appendix II – Letters from Nursing Research Committee &amp; IRB</td>
<td>30</td>
</tr>
<tr>
<td>Biosketch of Primary Investigator</td>
<td>32</td>
</tr>
</tbody>
</table>
Problem Statement

This research study will further advance the specialty of staff development practice by identifying specific performance criteria for a wide range of staff development competencies. In today’s environment of cost-containment and accountability, it is critical that staff development (SD) educators demonstrate their competence.

The National Nursing Staff Development Organization (NNSDO) has defined staff development as “the systematic process of assessment, development, and evaluation that enhances the continued competence and performance/professional development of health care providers” (NNSDO, 1999). Staff development activities focus on competence assessment and competence development. The goal and outcome of all staff development activity is competence. This focus is consistent with the current emphasis on efficiency, quality, and effectiveness.

Competencies are broad statements describing an aspect of practice that must be developed and demonstrated (Jeska, 1998). Competency statements should reflect the broad and measurable aspects of practice and should be clear and understandable to the persons demonstrating and validating the competencies. This study is designed to identify the critical behaviors for staff development competency statements to further define and describe staff development practice.

Specific research objectives are:

1. To identify performance criteria for a comprehensive list of both subjective and objective SD competencies, using the same process as used in the pilot study

2. To validate the resultant performance criteria
Background and Significance

Competence focuses attention on learning outcomes. It is about what people can do. It involves both ability to perform in a given context and capacity to transfer knowledge and skills to new tasks and situations (Harris, Guthrie, Hobart & Lundberg, 1995). Various state boards of nursing are studying how nurses maintain competence in a rapidly changing health care environment (Green & Ogden, 1999). Consumers, legislators, and regulatory agencies are all concerned with this issue. Boards of Nursing in Kentucky, Oklahoma, and Texas are currently addressing staff nurse competency issues using the National Council of State Board of Nursing (NCSBN) standards of competence as a framework. Kentucky developed a model for determining initial and continuing competency, Texas offered grants to conduct pilot programs studying competency issues, and Oklahoma piloted a profile to validate how standards of nursing competency were being met. The Ohio Board of Nursing is also working on competency issues. All of these activities demonstrate the need to describe and validate competency.

Staff development nurses also need to demonstrate competency. One group that provided guidelines for the novice nursing staff development educator was Fischer, Lickman, White, Vottero, and Coye (1994). This document, designed as a guideline for the orientation of novice nursing professional development educators, included competency statements and the associated critical behaviors, as well as suggested learning resources and evaluation methods for this role.

Joint NNSDO/ANA Council Task Force on Advanced Practice

A project of the ANA Council and NNSDO examined advanced practice in nursing SD. This group used the Delphi Technique to identify advanced SD competencies. The first questionnaire was sent to nurses certified in nursing Continuing Education (CE) and SD by the
American Nurses Credentialing Center (ANCC), members of the ANA Council, and members of NNSDO in September of 1995. A total of 5,575 questionnaires were mailed out, and 1,162 were returned, for a response rate of 21%. From this data, six categories of competencies were identified. These were: level of awareness, educational process repertoire, establishing relationships, interacting with the practice environment, contributions to the profession, and individual characteristics. Definitions of these categories are as follow:

- **Level of awareness** – the ability to acquire and process information relative to changes and expectations associated with the practice setting.
- **Educational process repertoire** – the education skills and methods developed over time relative to role, successful outcomes, and expertise.
- **Establishing relationships** – the strategies and skills that increase connections between or among persons within the context of the practice environment and patient care.
- **Interacting with the practice environment** – the characteristics that enhance the educators’ ability to ensure that education is included in advancement of the organization.
- **Contributions to the profession** – the strategies and skills used to advance the profession and practice of SD and CE.
- **Individual characteristics** – the individual attributes and skills that contribute to educational efforts. (Report, 1997).

From the first round of questionnaires, 77 characteristics of SD/CE practice were identified. For each of the items, respondents were asked to rate each item based on whether the characteristic distinguished advanced from general SD/CE practice. The rating scale was a 6 point Likert scale, where 1 = to a minimal extent and 6 = to a great extent. The second round
survey was sent to only those nurses who were certified in nursing CE and SD, which was a sample of 2,463. There were 727 questionnaires returned, for a response rate of 29.5%. The second round results yielded item means ranging from 3.31 to 5.16. Sixty-three of the competencies had means of 4 or greater and represented characteristics viewed by this sample as advanced practice competencies.

A factor analysis with a varimax rotation was conducted on the 63 competencies to detect potential domains. Using a minimum eigen value of 1.0, 11 factors were extracted. These factors accounted for 62.9% of the variance. The pilot study was conducted on the highest ranked competencies in factor 1, which accounted for 33% of the variance. This factor dealt with relationships with others and the organization, and included many of the competencies any advanced practice nurse might need to be successful in any organization.

Competencies of Staff Development Educators

Brunt (1999) developed a competency assessment tool for staff development educators, which included the competencies identified by the NNSDO/ANA Council Task Force, as well as basic competencies she identified from her 20 years of experience in staff development and the literature. A copy of this tool, Competencies of Staff Development Educators – Personal Assessment of Competency, is included in Appendix I. This research study will identify specific measurable performance criteria for eleven selected competencies in this tool.

Significance

The American Nurses Association has identified continued competence as one of the core issues for 2000 (ANA, 1999). There was a continued competency forum at the ANA 1999 House of Delegates and approximately half of the 77 education sessions at ANA’s 2000
convention are aimed at assisting nurses in maintaining their continued competence (Continuing Competence, 1999). The newly revised *Scope and Standards of Practice for Nursing Professional Development* (ANA, 2000) is based on a framework of continued competence.

This research study is consistent with the research priorities in nursing staff development described by Schoenly (1994). The top research priority focused on the outcome of education. A need for the development of valid evaluation instruments for measuring competency, quality, and the outcomes of staff development was identified. This study will provide a validated, comprehensive array of performance criteria to determine achievement of staff development competencies.

This research study will also build on the work of the Joint NNSDO/ANA Council Task Force by validating and further describing the advanced practice competencies identified in the report of the Task Force on Advanced Practice in Nursing Continuing Education and Staff Development (1997).

This research study will advance the specialty of staff development practice by helping to meet the following priorities in NNSDO’s 2000 strategic plan:

1) support research in staff development by continuing to fund studies that meet established criteria

2) strengthen its affiliates by including them in the validation of the performance criteria statements

3) investing in research and leadership development

4) disseminating research findings
The primary investigator for this study hopes to write a monograph on performance criteria for educator competencies, using the results from these research studies. As the number of competencies has grown, duplication and overlap has become apparent. The PI will synthesize results from all the studies and should end up with a more manageable number of competencies and performance criteria. The goal is to put these competencies in the specific roles identified in the Standards for Nursing Professional Development (ANA, 2000). This document would add to the body of staff development literature, providing specific, measurable criteria for staff development competencies. Once these behaviors are identified, they can be used or adapted by institutions, staff development specialists, or organizations to determine if staff development educators are meeting those competencies. This will provide a consistent, objective, validated tool to assist with self-assessment, identification of specific behavioral expectations, or performance evaluations for staff development educators. This method can also be replicated to develop performance criteria for competencies in other specialties.

Rationale/Framework

This study is a continuation of an earlier study done by the joint NNSDO/ANA Council Task Force on Advanced Practice in Nursing CE and SD and a pilot study done by Brunt (2002). As discussed earlier, the NNSDO/ANA Council study employed the Delphi Technique, which is the use of expert opinion. To keep the two studies congruent, the further development of performance criteria for the competencies will be done using a survey technique, instead of a Delphi Technique. This allows the study to integrate data for both subjective and objective competencies.
Research Design and Methods

Method

The method for this study was developed from a pilot study done by the primary investigator (Brunt, 2002). This study was approved by the Summa Health System Nursing Research Committee and granted an exemption by Institutional Review Board (see Appendix II).

The following conceptual definitions of competence, competency statement, and performance criteria will be used in this study:

**Competence** – a person’s capacity to perform his or her job function (Kelly-Thomas, 1998).

**Competency statement** – A statement that describes a general or broad area of behavior/performance that is requisite for being competent in a particular role and work setting (Alspach, 1995).

**Performance criteria** – statements that define the critical or essential behaviors that represent a particular competency (Alspach, 1995).

All of the competencies identified in the assessment tool in Appendix I will be included in one of nine distinct studies identifying performance criteria for staff development competencies. Each study will include both subjective and objective statements, with no more than 4 subjective statements in any study. Subjective statements are more conceptual without concrete behaviors that are obvious and are statements that can not be quantified. They need to be validated through inductive, holistic, subjective, and process-oriented research methods used to observe, document, describe, understand, analyze, and interpret the concept. Objective statements are those statements that are more definitive, suggesting more easily measurable
criteria, and can be quantified and validated through statistical analysis, such as ranking on scales, or ratios of a variable to an established standard.

Each of the competencies identified in the tool were independently classified as either subjective or objective by three different individuals: the primary investigator, a Ph.D. nurse researcher, and a certified staff development educator, who had fourteen years of experience working in various staff development positions. The determination of whether a statement was considered to be subjective or objective was determined by comparing the three responses and if there was disagreement, it was classified by the majority response. A list of the competencies which will be included in this study and whether they were classified as subjective or objective is included on the following page.
<table>
<thead>
<tr>
<th>Category</th>
<th>Competency Statement – Study 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective 1</td>
<td>Seeks opportunities to develop the various staff development roles.</td>
</tr>
<tr>
<td>Objective 2</td>
<td>Maintains educational and/or clinical competencies appropriate to role.</td>
</tr>
<tr>
<td>Objective 3</td>
<td>Maintains confidentiality.</td>
</tr>
<tr>
<td>Objective 4</td>
<td>Determines and/or revises priorities for scheduled and unscheduled educational activities.</td>
</tr>
<tr>
<td>Objective 5</td>
<td>Accesses resources needed to facilitate research.</td>
</tr>
<tr>
<td>Objective 6</td>
<td>Evaluates &quot;impact&quot; of educational efforts.</td>
</tr>
<tr>
<td>Subjective 7</td>
<td>Develops broad-spectrum educational assessment efforts.</td>
</tr>
<tr>
<td>Subjective 8</td>
<td>Integrates ethical principles in all aspects of practice.</td>
</tr>
<tr>
<td>Subjective 9</td>
<td>Promotes a safe and healthy work environment.</td>
</tr>
<tr>
<td>Subjective 10</td>
<td>Facilitates the initiation and adoption of change.</td>
</tr>
<tr>
<td>Subjective 11</td>
<td>Models behaviors that reflect continued personal and professional growth.</td>
</tr>
</tbody>
</table>
Terminology for each of these statements will be reviewed and clarified with a definition to guide the work, if needed. A definition will be developed from the literature by the primary investigator for any terms needing clarification. The following steps will be completed to develop performance criteria for the competencies.

1. The primary investigator will develop selected definitions as noted above.

2. The primary investigator will develop 4-6 measurable performance criteria statements for the objective competencies. This will lessen the burden on the respondents. A survey will be sent to the participants in the study, asking them to indicate on a 6 point Likert scale how well each of the performance criteria would indicate achievement of that competency.

3. For the subjective competencies, participants in the study will be asked to list 3 performance criteria that could be used to indicate that someone met the competency.

Sample: The sample for this study will be a random stratified sample of nurses certified in nursing professional development through the American Nurses Credentialing Center (ANCC). The mailing list obtained for the pilot study will be used in this larger study. There are currently 1,675 nurses certified in this specialty. Using information from the ANCC database and a division of participants by time zone, 277 nurses who are currently certified in nursing professional development will be asked to participate in this study. There were approximately 100 nurses out of 300 nurses who responded in the pilot survey; and the first 5 studies. However, with study 6 & 7, where the non-responders from the first 5 studies were sent surveys, the response rate decreased significantly. For studies 8 & 9, I am sending the survey to those
who responded to the first 5 studies for additional feedback. The cover letter and draft of the survey form to be used in this study are included on pages 12 - 14.
Letter to Participants

Date

Dear Staff Development Colleague:

I am conducting research studies on staff development competencies. This study is funded by a grant from the National Nursing Staff Development Organization. As a nurse who is certified in nursing continuing education and staff development, you were selected to participate in this study. My goal in this study is to develop specific performance criteria for staff development competencies. As I am entering phase 2 of this study, I am soliciting additional feedback from individuals who participated in a previous study.

Attached is a questionnaire that should take approximately 30 minutes to complete. Your responses are very important to this project. All questionnaire responses will remain confidential. To ensure confidentiality, please do not put your name on the questionnaire. An identification code will be used. Data will be reported for the entire group. The return of this questionnaire implies informed consent. Your participation in this study is voluntary. There are no known risks associated with this study.

The attached questionnaire has performance criteria listed for 7 competencies. Please use the Likert scale to indicate how well the performance criteria indicate achievement of that competency, and include any comment/suggestions for additional statements. There are also 4 competencies for which I would like you to identify 3 performance criteria that you think would indicate someone met that competency. Do not go to the literature for statements – just put down ideas or key points you think would be appropriate. I will be analyzing the feedback from everyone to identify common themes and develop performance criteria statements.

Please complete the questionnaire and return it by date. A pencil and a pre-addressed stamped envelope have been included for your convenience in completing the survey.

Thanks you in advance for your assistance with this study. If you have any questions about this study, you may contact the nurse researcher Barbara Brunt, MA, RN, BC at (330) 375-3075. If you have any questions about your rights as a research subject, you may call the Nursing Research Coordinator Eileen Fleming, MSN, RN at (330) 375-7554 or the Institutional Review Board of Summa Health System at (330) 375-4045.

Sincerely,

Barbara A. Brunt, MA, RN, BC
Manager, Nursing Education and Staff Development
Survey Form – Study 9

Code ______

Demographic Data

Years in Staff Development: ___________ years

Age: _______ years

Sex: Male______  Female ______

Number of years you have been certified in nursing continuing education and staff development: 

_______ years

Current Role:   Administrator/Manager _____  Educator _____

Other (please describe):____________________________________________________

Survey Form – Study 4

Directions: For each of the performance criteria identified for the competency statements, indicate by circling the appropriate number of the Likert scale how well you think it would indicate if a person met that competency. Very reflective would indicate you think it was a good descriptor to measure that competency; not reflective would indicate it is NOT a good descriptor. Some key terms, marked with an asterick (*) have been defined to help direct your answers.

First Section

Objective competency statements with specific performance criteria included

<table>
<thead>
<tr>
<th></th>
<th>Very Reflective</th>
<th>Not Reflective</th>
</tr>
</thead>
<tbody>
<tr>
<td>a.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>b.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>c.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>d.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>e.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>f.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

Comments/suggestions for other criteria:

Continued
Second Section – subjective competencies

**Directions:** For each of the competencies listed below, please write in 3 ideas for performance criteria you think would indicate that someone met that competency. Just jot down ideas or key points.

**Subjective Competency Statements**

a. ____________________________________________________________________________

b. ____________________________________________________________________________

c. ____________________________________________________________________________

If you have any comments of suggestions, please write them here.

Thank you for your assistance with this study. Please return this survey by **Date**
All participants will be sent the cover letter, demographics/survey form, a self-addressed stamped envelope and a pencil with the first mailing. They will be asked to respond in a 4-6 week time frame. A reminder letter and another copy of the survey form will be sent to all participants after the first deadline date to maximize the return rate.

Since there were quite a few incorrect addresses in the ANCC database, names and addresses for the certified nurses in each study will be compared with the NNSDO database to make appropriate address changes before the surveys are sent out.

Analysis and Validation

For the objective statement, mean scores will be tallied for all the performance criteria. For the subjective competencies, the primary investigator will compile the suggestions from the respondents to develop performance criteria statements by doing a content analysis to synthesize related terms.

A final step in each study will be to submit the revised list of performance statements for both the subjective and objective competencies to one or more of the NNSDO affiliate groups for validation. They will be asked to rate all the performance criteria on a scale of 1 to 6. Comparison of the ratings of the two groups will validate the highest-ranking criteria. Each study will be sent to a different affiliate group to lessen the burden on any one group of affiliates. A sample letter sent to the NNSDO affiliates is on page 16.

A t test will be done to compare responses from the national and regional samples. To indicate agreement p values from t tests should be nonsignificant.
Follow-up Letter to Affiliates

Date

Dear Staff Development Colleague:

Since you are a member of one of the NNSDO affiliate groups, I would like your feedback on a research study. This study was funded by a grant from NNSDO. The study is designed to identify measurable performance criteria for competencies in staff development. The first phase of this pilot study was sent to a random stratified sample of nurses certified in nursing continuing education and staff development. For this second phase, I am asking all members of your affiliate group to validate the information received in phase one.

Attached is a survey form with eleven competency statements. Please use the Likert scale to indicate how well the performance criteria indicate achievement of that competency. The questionnaire should take less than 20 minutes to complete. Your responses are very important to this project. All responses will remain confidential. Data will be reported for the entire group. Your participation in this study is voluntary and the return of this questionnaire implies informed consent.

Please complete the questionnaire and return it by Date. A pencil and a pre-addressed stamped envelope have been included for your convenience in completing the survey. If you have any questions about this study, you may contact the nurse researcher Barbara Brunt, MA, RN, BC at (330) 375-3075. If you have any questions about your rights as a research subject, you may call the Nursing Research Coordinator Eileen Fleming, MSN, RN at (330) 375-7554 or the Institutional Review Board of Summa Health System at (330) 375-4045.

Thank you in advance for your assistance with this study.

Sincerely,

Barbara A. Brunt, MA, RN, BC
Manager, Nursing Education and Staff Development
Risks to Subjects

There are no identified risks to participants in this study. All personnel who participate in this study will be given a code number as identification and all data will be reported in the aggregate, rather than individually. Confidentiality will be provided. Completion of the survey will indicate consent to participate in the study.
Budget and Budget Justification

Based on the costs and amount of time involved in the pilot study, I am asking for $1,000.00 for this study, to cover the expenses as listed below:

- 370 10 x 13 envelopes $43.00
- 370 Business reply envelopes with postage paid 26.20
- 370 Pencils 22.20
- 1 package card stock 5.80
- Postage for first class mailing of surveys 214.60
- 250 Business size envelopes for reminder surveys 12.50
- 1 package of laser labels 10.50
- Postage for follow-up mailing for participants 92.50
- 6 reams of paper for letters, surveys, etc 14.70
- Cost for xeroxing of all letters, surveys, etc ($.05 page) 200.00
- Postage for follow-up mailing 45.60
- Estimated costs for data entry and analysis 312.40

Total cost $1,000.00

Note: The cost for the purchase of the mailing list of certified nurses was $305.00. The request for that list included both the pilot study and subsequent larger study, so there will be no costs for that database included in the costs for this study.
Timeline

It will take approximately four months to complete this study. If approved, the work on this study is projected to begin May 2003 and be completed in September 2003.
References


ANA to focus on core issues. (1999). American Nurse, 31(6), 17.


Appendix I

Competencies of Staff Development Educators – Personal Assessment of Competency
Appendix II

Letters from Nursing Research Committee and IRB