Education and Training Procedures for Central Service Personnel

LEARNING OBJECTIVES

1. Explain the difference between education and training as it relates to developing skills-based training programs for central service professionals
2. Describe a process to help assess the learning needs of trainees
3. Discuss the importance of considering learning styles in the development of training programs
4. Review typical learning styles that influence how training should be provided
5. Discuss procedures for evaluating the success of training programs

ONGOING EDUCATION AND TRAINING IS A WAY OF LIFE FOR Central Service (CS) professionals. In today’s healthcare environment, the fast pace of change and technological advancement confronts CS staff everywhere. Many employees realize that the more they learn, the more they must learn. In addition to new and advanced technology, it is now necessary to learn how to “work smarter” and to do more with less. These additional constraints make education and training more important than ever, while making it even more difficult to attain. Educating staff and helping them maintain their competencies is essential to every CS department. This self-study lesson presents an overview of some basic procedures that can be helpful in planning and evaluating training programs.

OBJECTIVE 1: EXPLAIN THE DIFFERENCE BETWEEN EDUCATION AND TRAINING AS IT RELATES TO DEVELOPING SKILLS-BASED TRAINING PROGRAMS FOR CENTRAL SERVICE PROFESSIONALS

According to Merriam-Webster’s Dictionary, education can be defined as the knowledge and development resulting from an educational process. The purpose of education is to provide learners with basic skills—such as language and communication, mathematics, and science—that can help them continue learning. Successful education will encourage an interest in life-long learning, which is a requirement in many fields, including the healthcare profession. Without the fundamental tools acquired through education, it is nearly impossible to learn a skill or a job.

By contrast, training involves preparing incoming and currently-employed staff members for short- and longer-term position knowledge and skills. Training is a process by which someone is taught the skills needed for a particular art, profession or job.

It may sometimes be necessary to provide additional, remedial education to...
ensure successful training. Adult remedial education generally refers to training in basic skills necessary for employment, such as language, writing and mathematics. For example, it may be necessary to address the basic language needs of any trainees who may not speak English as a first (primary) language. It might be necessary to alter or adjust the language to a level appropriate for one or many trainees. Training could be conducted in different sessions, in the primary language of each group of trainees. In every instance, it is important for trainers to identify and incorporate any special concerns, such as these into planning the training. When the necessary educational building blocks are in place, the training module is more likely to succeed.

**OBJECTIVE 2: DESCRIBE A PROCESS TO HELP ASSESS LEARNING NEEDS OF TRAINEES**

You’ve learned that the first helpful step in effective training is determining whether the trainees have all the educational building blocks required for the training. To do so, trainers must have some basic information about the trainees. This is relatively easy when CS managers, supervisors and/or educators are training staff members with whom they interact on a daily basis. It is more difficult when a trainer must facilitate training for other departments within the facility, or for employees from other facilities, such as when a trainer is developing training for a local chapter of the International Association of Healthcare Central Service Materiel Management. In that case, a simple questionnaire can be helpful in determining the level of basic training needed (see sample in Figure 1). Each question should provide information to help tailor the training module to each trainee’s specific needs.

Other information might also be pertinent, but can often be obtained without asking specific questions.

Figure 1 provides useful information about learning needs, and reveals more than the questions ask. For example, if a trainee correctly completes and submits the form, the trainer has some evidence about his or her ability to read and write and to follow simple instructions. The trainer will also have an idea about what the trainee knows, based on work experience.

Question 2 identifies whether the trainee is seeking training, or is being directed to it by the supervisor. Required or mandatory attendance to a program may indicate disinterest or unwillingness to learn. Question 3 will inform the trainer about the level of information that should be presented. If, for example, all potential attendees have received similar information in previous training, more advanced or in-depth information can be provided.

The response to question 4 alerts the trainer to any need for potential language adjustments that can help make the presentation more beneficial to the trainees. If responses to question 5 indicate that several people are unable to attend all three sessions, this may indicate a need to adjust the training schedule.

Responses to question 6 will suggest if the respondent can articulate a written response. Is the handwriting legible? Are words spelled correctly? Is the response grammatically correct? Can the trainee read and follow simple instructions?

The answers to these and related questions will help the trainer determine if the planned training experience will be suitable to the learners, or if changes in format or style will be helpful.

**OBJECTIVE 3: DISCUSS THE IMPORTANCE OF CONSIDERING LEARNING STYLES IN THE DEVELOPMENT OF TRAINING PROGRAMS**

How can you identify problems that may be solved through training? Some methods for finding these problems in your department include:

- *Observing work performance* – CS managers who “manage by walking around” may notice staff using practices that do not match the facility’s established policies and procedures, or the standard operating procedures normally used. Note: Be sure that the required (standard) procedures, rather than the incorrect work practices observed, are being taught to new staff during their initial training sessions. An important part of the orientation program is return demonstra-
tion of specific procedures that should be standardized within the facility (e.g., wrapping a package).

• Asking for customers’ comments – Hopefully, your department routinely solicits and receives comments from your customers. The type of comments your customers make can help signal the presence of a problem (e.g., lack of good customer service skills). When these problems are identified, they can often be corrected through training.

• Staff members’ input – Managers in some facilities use suggestion boxes, open-door policies, frank and objective input gained from performance appraisals, and information obtained during coaching sessions to identify special problems that hinder staff performance. Proactively seeking input from staff can help potential issues surface before they become a real problem. This type of staff inquiry is helpful for managers who are unable to spend much time directly observing in the department.

• Performing inspections – Formal and informal inspections can provide useful information about the need for revisions in work processes that can be addressed by further training. Routine quality assurance projects and risk assessments are a great way to review a process. This may help reveal the need for additional training in specific areas or with certain personnel.

• Failing to meet performance standards – Clear performance standards that measure employees’ expected performance must be developed. Staff should understand the reason behind the standards and perform according to the set standards. Not following the performance standards may suggest the need for re-training to address the problem. One example may be wet packs resulting from overloading the sterilizer.

• Analyzing financial data – Differences between budget plans and actual operating data may indicate problems that can be corrected through training. Expensive reusable items being tossed after one use may be revealed in the financial analysis.

• Conducting performance analyses – Supervisors’ performance evaluations (appraisals/reviews) may identify issues that require action plans to resolve. Additional training is often part of these action plans (e.g., a supervisor may be playing favoritism with the schedule or staff assignments and may need coaching as to why favoritism is not productive and causes problems in the workplace.

• Assessing knowledge and skills – Post-training evaluation may suggest that the training already provided has not been successful, and that additional or different training is needed. Return demonstration of a specific skill set after the training can be very helpful in establishing comprehensive of the skill.

• Conducting exit interviews – Formal or informal discussions with staff who have resigned from the facility may yield information about training topics that could help improve operations.

While all process-related problems cannot be corrected through training, many can be. Once these problems are identified, training programs to address them should be planned and implemented. An important first step is to develop specific, measurable objectives that indicate how the situation will be if the training is effective, drive the content of the training program, and provide the basis for evaluating the program’s success.

OBJECTIVE 4: REVIEW TYPICAL LEARNING STYLES THAT INFLUENCE HOW TRAINING SHOULD BE PROVIDED

Adult learners have different needs than younger learners. For example, adults respond more favorably when they can select the training method to be used. In some situations, this will be possible. Unless the trainer can select the trainees, however, it is probably best to provide varied training experiences designed to meet the majority of the learning needs the trainer encounters. Most adults know and can describe their preferred learning style. Figure 2

<table>
<thead>
<tr>
<th>STYLE</th>
<th>DESCRIPTION OF STYLE</th>
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<tbody>
<tr>
<td>Visual</td>
<td>Wants to see how it’s done. Likes use of color visual aids, graphics and charts.</td>
</tr>
<tr>
<td></td>
<td>Distracted by overuse of lectures without visual aids.</td>
</tr>
<tr>
<td>Auditory</td>
<td>Wants to hear how it’s done. Oral repetition of what is heard and read improves retention.</td>
</tr>
<tr>
<td></td>
<td>Distracted by environmental noise.</td>
</tr>
<tr>
<td>Tactile</td>
<td>Wants to “get a feel for it.” Likes hands-on activities, and repetition improves retention.</td>
</tr>
<tr>
<td></td>
<td>Distracted by sedentary learning approach.</td>
</tr>
</tbody>
</table>
outlines basic differences between three of the most common styles.

Many CS topics lend themselves well to a combination of these learning styles. Watch learners for silent clues that may suggest a need to vary your presentation techniques. For example, when visual learners appear to daydream, they are looking elsewhere for information input. Auditory learners may be seen “mouthing” the words they are writing in their notes, to increase their stimulation. Tactile learners may squirm and move around in their seats. If you notice these silent clues, increase the variety and adjust the tempo of the training presentation.

Providing information in multiple formats will likely improve the learners’ retention and satisfaction levels. Visual learners need to be visually stimulated or they can quickly lose interest. Repeating important items can help auditory learners retain the information. Tactile learners need to be hands-on and return demonstration works well for their retention.

**OBJECTIVE 5: DISCUSS PROCEDURES FOR EVALUATING THE SUCCESS OF TRAINING PROGRAMS**

After a training program has been presented, its effectiveness must be determined. The training should be evaluated to assess how thoroughly the training objectives have been attained. The trainer can use evaluation tools, such as knowledge tests, skill observation, simulation, and analysis of applicable operating data (for example, reduced costs or increased customer service scores, depending upon the objectives of the training activity). Also, trainees can contribute to the evaluation. Examples of questions to ask trainees include:

- How well were learning objectives established and met?
- Was adequate time provided for the training?
- Were the training activities and methods appropriate?
- Was the training applicable to your work?
- Did the environment enhance your learning?
- To what extent will your job performance improve because of this training?
- Would you recommend this training program to others?

While these questions will provide insight about the trainees’ preferred styles of learning, they may not provide specific evidence that learning occurred. If performance-based objectives have been established, the evaluation will assess whether the trainees’ performance meets the objectives following the training. Example: If the training objective is to teach a new CS technician how to operate a steam sterilizer and, if proper operation is defined as consistently using the procedures specified in the operating manual, training can be evaluated by observing how the staff member operates the sterilizer after training.

Seeing the staff apply newly-acquired knowledge or skills on the job will indicate that real learning has occurred through the training. Accurate training assessment will consider both how the training has been implemented and the spin-off effects, such as improved morale, decreased employee turnover, and reduced numbers of mistakes, among numerous other benefits. The best indication of the effectiveness of training, for trainers who are educators at heart, however, may be when learners seek opportunities for additional training.

**RESOURCES**


Visit the following website on Training Needs Assessment: http://adulted.about.com/od/trng-needsassessment/a/needsassessment.htm.

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