

# A STATEMENT OF TRAINING PHILOSOPHY AND GOALS

*developing basic guidelines  
at Tucson Medical Center*

When starting my job as director of Education for the Tucson Medical center, it was my understanding and belief that a comprehensive Statement of Philosophy was essential for the development of a set of objectives and goals. The Statement of Objectives and Goals was, in turn, essential to the development of an operational and policy procedure manual by which the goals would be realized. To paraphrase an old saying, "You can't get where you ought to be if you don't know where you're going or how you're going to get there."

Accordingly, I contacted a large number of colleagues in both hospitals and industry to obtain whatever they had developed, with the hope that their efforts might serve as a guide to my department in the development of that essential Statement of Philosophy. The response was almost invariably similar: "We agree that development of a Philosophy and Objectives is an essential first step, but haven't had a chance to get around to it yet. As soon as you develop something, we would be delighted to receive a copy of it."

Here it is. With the thought and hope that it might prove helpful as a guide to others, I *am* delighted to share it.

## DEFINITIONS

In establishing a philosophy, goals, and operating procedures for an organization or department, it is sometimes necessary to employ terminology which is specific to that department and may be misinterpreted by others less acquainted with the operation of the department. To minimize such misinterpretation and confusion, the following definitions are provided:

**Teaching** - the art of assisting another person to learn. It includes both the providing of information (instruction) and the providing of appropriate conditions or activities designed to assist learning. It may also include "unplanned" or infor-

mal teaching by example.

**Learning** - the acquisition of knowledge, understanding, or skill by instruction, study, or investigation. Learning itself is not directly observable, but does result in a relatively permanent change of behavior that comes about as a result of practice.

**Training** - the teaching of information, skills or tasks of a relatively tangible or concrete nature. The purpose of training is to change (improve) the performance of the trainee(s) in specific ways. As contrasted with education, it is more often concerned with motor activities and skills.

**Education and Continuing Education** - the teaching of more complex, less tangible, and sometimes controversial areas of knowledge and behavior. Just a few examples might include such things as communication problems and practices, management development, principles of supervision, and the patient's role in the hospital.

**Orientation** - means to acquaint employee(s) with their relationship to the hospital environment as a whole, to their relationship within the department, and to the hospital procedures and policies which have an effect on these relationships.

**Needs (learning needs)** - basically, a need represents a lack of proper knowledge, skill, or attitude which prevents an employee from giving satisfactory job performance or which interferes with his potential for assuming greater responsibilities. It is the reason learning is to be done.

**Objective (learning objective)** - statement of what the trainee is to learn or to accomplish; the skill or knowledge the trainee(s) should demonstrate when the objective has been reached. The term Behavioral Objective may be used interchange-

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ably with Learning Objective.

Education Program - there is, strictly speaking, some difference in emphasis between an education program and a training program. The term as used here, however, will be used to encompass both; to refer to a deliberate effort by the hospital to provide employees, on whatever level, with the specific skills and information which will enable them to perform their present job most satisfactorily, to broaden their knowledge and understanding of the many factors and conditions which affect them within the work environment, to better prepare them to deal with that environment, and to prepare them for possible advancement. This usage is chiefly for the sake of convenience, and not out of any sense of strict propriety. The terms "Continuing Education" and

"Personnel Development" may be used interchangeably with "Education Program" - once again for the sake of convenience.

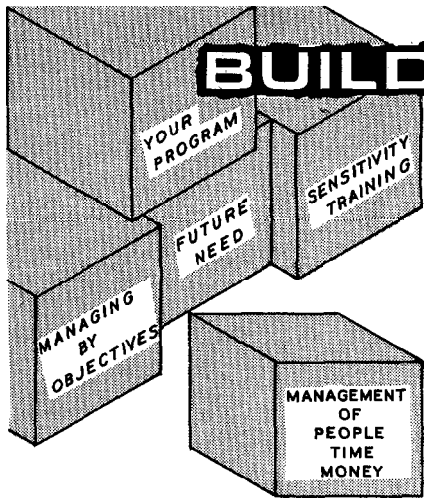
It will be helpful in using the above terms to think of both training and education as a process of changing the behavior patterns of employees (this is using behavior in the broad sense to include thinking and feeling as well as overt action).

**PREMISES**

In developing a statement of philosophy, premises are employed which not only lead quite naturally to the statement, but which are, in effect, themselves a part of it. The following premises have provided a basis for the development of the Statement of Philosophy of the T.M.C. Education Department and should be considered an essential part of that statement:

1. Change is inevitable under modern conditions and the hospital must commit itself to a policy of orderly change.
2. The acquisition of new knowledges and skills is a primary means through which progress is made.
3. Training and education is a continuous and universal process and the hospital has an obligation to make every effort to channel the process most constructively to meet the needs of the patient, the staff, the hospital, and the community.
4. The efficiency of any hospital de-

ern conditions and the hospital must commit itself to a policy of orderly change. The education department, in turn, must be committed to the introduction and channeling of such change in ways that are conducive to the achievement of the hospital's goals and enable more orderly adaptation to changing conditions.



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- pend directly on the ability of all employees to do their job efficiently and effectively and this can be accomplished only with an effective education program. Further, in discharging its responsibility for the quality of care rendered to patients, the hospital has the obligation to assure patients that those who provide service are competent to do so, and to constantly strive to improve the quality of patient care. As one means to achieve these goals, as well as fulfill its responsibility as an employer, the hospital should conduct a program of staff education.
5. An institutional commitment to a program of staff education for all employees and the support of administration to make such a program possible are fundamental to an effective education program.
  6. Although nothing the institution does diminishes the personal responsibility of each individual for his own education and improvement, the environment and opportunities for learning that are created by an effective education program are potent forces in stimulating the desire of staff members for self-improvement and, consequently, in bringing about the improvement of patient care.
  7. A climate of acceptance, encouragement, and support for an education program is the responsibility of all administrative and management personnel, and they must participate actively in planning and implementation of the education program.
  8. Personnel development must be thought of in hospital-wide terms, within all departments and at all levels, keeping in mind the importance of establishing priorities and the fact that various departments and personnel have different needs and degrees of acceptance.
  9. A program of continuing education for hospital personnel includes educational activities conducted both inside and outside the institution. Such activities as attendance at institutes, workshops, short courses, and meetings of professional societies, observational visits to other institutions, and the granting of scholarship aid for academic study are integral parts of a program of continuing education.
  10. The purpose of every education program, whatever its degree or level of sophistication, is in part to emphasize and promote both personal and vocational growth for the learner so that he may better assume his responsibilities.
  11. The establishment of any effective education program must include consideration of the personal, psychological, and social needs of the trainees as well as their professional, scientific, or technical needs.
  12. Increased job satisfaction, motivation, and morale result from professional and personal development made possible through an effective education program.
  13. Every employee has a very definite and potent educational influence on his peers. The methods, short-cuts, and attitudes he demonstrates all carry important meanings that are absorbed by and influence other workers. Thus, every employee in the hospital is a teacher, intentionally or otherwise; they must understand the fact that they are teachers, and accept the responsibility that the role involves.
  14. The supervisory and nurse management group is most important in the total education program. Centralized training cannot possibly supplant the training each management person must provide for his or her employees. Each department has special needs and special problems for which special adjustments have to be made. The social relationships in each department are unique and have to be adapted to within that department. Whether called "training" or not, nearly every instruction or correction given by a supervisor is a form of training. Every time a member of management talks to a group, he is in effect conducting an informal class.<sup>1</sup> Every manager, every leader of people is a trainer - either by design or by default.
  15. There are a number of strong arguments in favor of having management personnel conduct formal education programs as well as the informal training which they are constantly doing:
    - A. In teaching, very often the teacher learns more than his pupils. And the very fact that a management person must teach may make him more conscious of his own practices on the job.
    - B. When a manager does his own training, there is less chance that the employee will learn one form of behavior in class and another on the job.
    - C. The class setting provides managers and employees an opportunity to exchange views, or to talk over problems they may have been too busy to consider on the job.<sup>2</sup>
  16. An appropriately supplied library and promotion of its use is an integral part of the education program.
  17. The effectiveness of the teaching-learning process or transaction is dependent on a variety of factors, including:
    - A. The employment of good human relations principles in the education program.
    - B. A recognition that the teacher, the learner, and the group all have significant roles, and an understanding of those roles.
    - C. The employment of sound principles of adult education.
    - D. The teacher's pursuit of excel-

lence.

E. The student's desire to learn, and pursuit of excellence in learning.

18. Unless the program coordinates employee and hospital needs, it will not have much value. Coordinating these needs requires an Education Department staff sensitive both to the ambitions and goals of hospital staff members and to the philosophy and purposes of the institution.
19. Any education program, to be worthwhile and effective, must be based on an adequate and realistic determination of learning needs, realistic setting of learning objectives to meet these needs, and must result in a behavioral change to meet those objectives. The assessment of educational needs is a continuous process, and is the responsibility of all management staff, medical staff,

and education department personnel.

20. The specific objectives of any education program must be clearly defined and become the criteria by which teaching methods and procedures are developed, materials and teaching tools are selected, and evaluation made possible.
21. Sound evaluation of any given education program is the only means by which the hospital can measure the contribution of the program. It also provides the only realistic basis for revision of the program to better meet its objectives if it is to be repeated at some time in the future and it leads to improvement of the student and of the teacher. Ultimately, the value of any specific education program must be examined in terms of the relationship between the objectives of that

program and what is learned by the trainees. The review and evaluation of education programs is the joint responsibility of the Education Department, the medical staff, and administrative and management personnel.

22. For an effective education program, it is essential to establish program objectives and goals. In the final analysis, program objectives and goals are matters of choice, and must be considered, in large part, value judgements of those responsible for the program. A comprehensive philosophy, therefore, is necessary to guide in making those judgments.
23. Just as a comprehensive philosophy is necessary for and leads to the development of program objectives and goals, those objectives and goals must in turn guide (and lead to) the development of operating procedures by which they will be realized.

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24. Any statement of philosophy, program objectives and goals, and the operating procedures through which they will be realized must all be dynamic; they must ever change to reflect the ever changing needs of the community, the hospital, and the hospital staff. If they do not change to reflect those changing needs, it defeats not only the purpose of the statements, but of the education program as well.

### PHILOSOPHY FOR EDUCATION

The Tucson Medical Center Education Department accepts the preceding premises as a true statement of our understanding and beliefs. With that acceptance, we also accept a responsibility for the training and continuing education of all employees, regardless of level or department. The Education Department Staff will work closely with administration and management and other personnel in enabling employees to develop their personal capabilities to the fullest in the work environment.

With increased knowledge and skill, employees gain a sense of confidence and security which will be reflected in improved patient care and provision of services. The education program is planned to meet the hospital's current needs for efficiency and effectiveness, and to prepare the entire staff for the increased demands of the future.

An on-going program of staff development through education, requiring the involvement and active participation of all hospital personnel, must be a vital and dynamic part of the total hospital program.

### EDUCATION DEPARTMENT'S ROLE

The following has been adopted as the role of the Education Department at Tucson Medical Center:

1. Coordinate the total education program for the hospital, and represent the hospital in its liaison with educational institutions, other hospital education pro-

grams, and other appropriate resource agencies.

2. Provide or assist in providing indoctrination and induction programs for new employees.
3. Support and act as coach or consultant to line and staff management personnel who desire and/or need such assistance.
4. Keep informed concerning educational resources and programs, on both a local and national level, and utilize and disseminate such information as appropriate.
5. Provide and recommend teaching materials.
6. Assess educational needs of the employees and the hospital, and coordinate the employee's needs and the hospital's needs in the development of educational programs.
7. Develop (and stimulate the development of) sound education programs to meet the needs of the employees and the hospital.
8. Assist in the review and evaluation of specific education programs and of the total education program.
9. Initiate and promote the development of appropriate research programs.
10. Identify, evaluate, and cooperate with pertinent resource agencies (the University of Arizona, Pima College, other hospitals and health agencies, the school system, etc.) to promote and develop programs of basic and continuing education for hospital and related health personnel.
11. Help individuals, institutions, and related organizations in accomplishing for themselves appropriate functions of continuing education, and complement such efforts.
12. Cooperate with pertinent resource agencies in the promotion and development of health careers programs, and in stimulating interest in health careers.

### CONTINUING OBJECTIVES

1. Assist in the introduction and channeling of change in ways that are conducive to the achievement of the hospital's goals and which enable more orderly adaptation to changing conditions.
2. Promote efficiency in the overall hospital operation through the development of individual competence and efficiency of all employees, while also providing an opportunity through training for the employee(s) to better deal with their work environment, to be prepared for and deal with changes brought about by changing methods and conditions, and to develop to their fullest potential.
3. Promote the improvement of patient care by improving the competence, performance, and understanding of employees.
4. Encourage an acceptance and appreciation on the part of employees of their responsibility for continuing personal improvement and development through continuing education.
5. Encourage and foster development of a climate of acceptance and support on the part of the community, the administration, and all employees for the education program.
6. Promote good inter-personal relations and effective communication through the education program.
7. Employ sound principles of adult education and human relations in the fostering and development of education programs, both within and outside of the hospital.
8. Provide for upgrading of the Education Department Staff through attendance at outside educational programs.
9. Periodically review, evaluate, and revise as necessary the Philosophy (and Premises), the Roles and Objectives, and the Operating Policies and Procedures of the Department of Education.

## SHORT AND LONG RANGE GOALS

Since goals must be very specific to the department involved, the T.M.C. Education Department goals are not included here. The guidelines used in developing those goals follows and may be helpful to others.

Goals, to be valuable, require a great deal of effort, thought, and time in their development. Properly done, their value is five-fold:

1. They organize thinking. The very act of expressing the goal in words assists greatly in identifying the needs of the organization as well as the department's needs, and in beginning the planning process for reaching them. Once developed, serious thought about the goal is extremely helpful in determining the approach to be taken and in organizing efforts to fulfill it.
2. They serve as a criteria to measure the success of the program. They

may also indicate the need to rework the program.

3. Done properly, they serve as predictors of what will occur.
4. They provide a foundation for the development of specific operating procedures, policies, etc.
5. They can be used to evaluate the soundness of specific or contemplated actions.

Writing good goals is an art which must be learned through practice. There are, however, some principles which may act as guidelines:

1. Goals should identify the physical state you intend to reach. The methods or processes by which you expect or intend to get there should be left to policy statements or a manual of operating procedures. The goal is the target, not what is going to be done to reach it.
2. Goals must be specific and use

definite and illustrative words. It should be possible for anyone reading the goal statement to get a clear picture of the department's objectives.

3. The goals must provide objective yardsticks for measurement. They should state when the goal is reached and what the specific level of accomplishment will be.
4. Goals should be short and concise, without omitting important concepts. It may be necessary to state a major goal in broad terms and to support it with specific sub-goals.
5. Goals must be realistic and honest. They must be capable of attainment, rather than "wish statements." To develop a set of goals to hoodwink administration is, in the end, self-defeating.

## REFERENCES

1. Straus and Sayles *Personnel*, Prentice-Hall. 1960.
2. Ibid.

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