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## Planning for impact: Transfer of training audit

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### Abstract

Transfer of training refers to the on-going application in the work setting of knowledge, skills, and attitudes acquired via a training/PD (professional development) programme. However, lack of transfer is recognised as an important factor in the literature, for not only is it unproductive training for the individual and the employing organisation but vast amounts of money are being squandered. The strategic planning for transfer has been recognised as a means of overcoming this concern. In this paper, consideration will be given to the development of a transfer of training audit (TOTA) to assist training and PD facilitators to effectively develop a plan to promote transfer in professional settings. Consideration will be given to a range of elements that are related to the promotion of effective transfer planning including roles of key players, learner characteristics, programme delivery, learning context, implementation development, strategies choice, and evaluation processes. An evidence-based approach using research findings, clinical experience, and contextual considerations will be used to identify important factors associated with successful transfer of training. It is anticipated that the development of TOTA will be a formative process with modifications and additional ideas added over time.

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### 1. Introduction

In the past 30 years there have been considerable literature, theory, research and practice developments relating to transfer of training – the application of training ideas to a work setting. Not only has its importance in achieving improved performance outcomes been recognised but it has also been linked to a range of enhanced performances in the personal, professional and economic domains (Leberman, McDonald, & Doyle, 2006). Given this, and with the huge amounts of funding devoted to improve performance, the importance of achieving transfer is widely acknowledged as a priority in training and (PD). Nevertheless, the strategic incorporation of effective principles and\*

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practices of transfer are still often overlooked in training/PD designs and transfer is simply expected to occur, but often doesn't (Saks, 2002). Sometimes, this is due to lack of operational awareness and understanding about transfer or because the complexity of planning courses with embedded transfer features is regarded as too demanding. One approach to developing a transfer plan is to evaluate the instructional design in terms of the incorporation of the necessary transfer design features that would facilitate transfer and then combine these features into a coherent strategic approach. This paper utilises ideas from the literature to develop a transfer of training audit which could be used to assess the degree of transfer-promoting features in any programme and provide a foundation for the development of a coherent strategic transfer plan.

## **2. Transfer of Training**

Haskell (2001) defines transfer of learning as “our use of past learning when learning something new and the application of that learning to both similar and new situations” (p. xiii) whilst transfer of training, a sub-set of this, refers to the transfer of formal and informal learning arising from a course or workshop (Broad & Newstrom, 2001). Most commentators and researchers (e.g., Haskell, 2001) believe that transfer can occur if it is promoted and repudiate the idea of some (e.g., Bereiter, 1995; Detterman, 1993) that it will take care of itself or that it cannot be readily achieved. This uncertainty has partly arisen because transfer has always been a bewildering, controversial and complex concept (Barnett & Ceci, 2002; De Cort, 1995) – as early as the beginning of the 20th century it was characterised by debate and opposing research paradigms (Leberman et al., 2006). This discussion has often centred upon four diverging perspectives: the identical elements, gestalt, formal disciplines and, in more recent times, the cognitive approaches. The identical elements theory emphasised the specific transfer of specific skill and hence importance was attached to similar elements in the training and target environments (e.g., learning to drive a car by use of a simulator). Gestalt explanations highlighted the specific transfer of a general skill to various target settings such as the common use of problem-solving skills in various settings, for example educational and medical contexts. The proponents of both perspectives were unanimous in opposing the alternative formal disciplines account (e.g., Binet, 1899) which implied that transfer could occur via the general transfer of general skills (e.g., the disciplined learning of Latin could improve outcomes in unrelated content areas) (Mayer & Wittrock, 1996).

In more recent times, with the emergence of an emphasis upon cognitive research, there has been a renewed interest in transfer of training and an emphasis upon the importance of meta-cognitive control of specific and general skills for transfer (e.g., Brown, 1989), an approach which has combined some aspects of the previous theoretical explanations (Mayer & Wittrock, 1996). Nevertheless, discussion and debate about the theories and operationalisation of transfer have continued, one benefit being understanding, conceptualisation and the development of applied training programmes have been advanced.

The Baldwin and Ford (1988) paper was an impetus for the resurgence of transfer with its detailing of an input-process-output model of transfer of training. Not only did this foreshadow the development of theory-research-practice links but also considerable discussions, alternative explanations, and development of competing models. For an extensive outline of theories and models of explanation up to 2002, refer to McDonald (2002). This interest has subsequently been sustained in an international context that recognises the importance of new learning paradigms emphasising relevancy of theory-practice links, the significance of knowledge, capital and global economies demanding meaningful, relevant and transportable information and the awareness that training funding did not necessarily result in transfer (Leberman, et al., 2006). Evidence of this renewed interest in transfer can be identified by the flood of reviews in periodicals relating to transfer theory-research-practice issues (e.g., Baldwin, Ford, & Blume, 2009; Blume, Ford, Baldwin, & Huang, 2010; Burke & Hutchins, 2007; Cheng & Hampson, 2008; Cheng & Ho 2001; Ford & Weissbein, 1997; Grossman & Salas, 2011; Holton, Bates, & Ruona, 2000; Lobato, 2006; Merriam & Leahy, 2005; Yamnil & McLean, 2001). Furthermore, there has been numerous texts (e.g., Broad, 2005; Broad & Newstrom, 2001; Carnes, 2010; Cree & Macaulay, 2000; Haskell, 2001; Kirwan, 2009; Kraiger, 2002; Leberman et al., 2006; Mestre, 2005) examining the theoretical, conceptual, and practical issues in depth. Although this literature indicates that a number of theoretical, operational, and practice differences remain and more research is needed, there is increasingly a growing understanding about what can facilitate transfer. It is noted (e.g., Blume et al., 2010), however, that many transfer strategies are likely to be interactive and impact may be multifarious and that further research is needed to identify the relationships between these factors. Nevertheless, the

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