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Trainees' Perceptions on Supervisor Factors That Influence Transfer of Training

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2017

Abstract

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by

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MA, University of Phoenix, 1998

BS, Southern Illinois University, 1991

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

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Abstract

A midsize nonprofit blood bank organization is experiencing a high percentage of supervisors and managers not transferring skills taught in leadership development training programs back to the workplace. The purpose of this mixed methods, sequential, explanatory study was to understand the relationship between supervisor support or opposition and trainees' perception on factors that influence transfer of training and to identify strategies to improve transfer of training in the organization. Baldwin and Ford's Model of the training transfer process laid the framework for this study. Quantitative data were collected from trainees ($N = 60$) who attended leadership development programs between January 2012 and June 2014 and were analyzed using descriptive analysis, correlational analysis, and multiple regression. The correlation analysis indicated positive relationships between transfer of training and supervisor support. Qualitative data, collected during interviews ($N = 8$) that focused on trainees' perceptions on how to enhance transfer of training in the organization, corroborated the quantitative results. According to thematic analyses of the interview data, supervisor support, training design, opportunity to use skills on the job, and performance coaching and mentoring have the potential to improve training transfer. Policy recommendations were created to increase transfer of training back to the workplace. The findings of the study could help supervisors and managers increase training transfer, which could improve the organization's profits and create collaborative learning environments that benefit the participants and the communities where these participants live and work.

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Dedication

This work is dedicated to my family. In loving memory of my father, James W. Chambers, Sr., you may be gone but not forgotten. I would like to extend a special thank you to both my wonderful husband Larry and my beautiful daughter Tiffany. You both believed in me and helped me persevere even when I was ready to give up. I will forever love you. And to my mother Lorraine Chambers, this has been a trying year and you are persevering against all odds.

Acknowledgments

I would like to give thanks to my husband and family all of whom assisted in this journey. I would like to thank my mother, Lorraine Chambers, for her assistance as well. Many thanks to colleagues and the support of the Walden faculty in getting this far in the process. I would like to thank Dr. Olga Salnikova, Dr. Dustin Hebert, and Dr. Joanna Karet for their support and guidance.

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Section 1: The Problem

Introduction

The site for this study, a midsize nonprofit blood bank organization, is in the midst of change related to decreased funding, increased competition, regulatory demands, mergers and acquisitions, and the economy. Downsizing and streamlined organizational structures are also causing change and turmoil within the industry and the study site. According to a study conducted by the organization in November 2012 (Organizational Development Manager, personal communication, December 13, 2012), it was projected that the organization might lose 50% or more of its core and strategic leadership team within the next 5 years. Core leadership positions are critical positions for getting the job done, and strategic positions are defined as critical to successful completion of the company strategic goals.

As Baby Boomers age, organizations are experiencing the loss of leadership talent. According to the Association of Fundraising Professionals (2009), approximately one third of all nonprofit organizations were looking to fill senior leadership roles. The current U.S. Baby Boomer population, which includes people between the ages of 47 and 65, comprises nearly 40% of the workforce (U.S. Census Bureau, n.d.). Thirty-five million of them will retire between 2000 and 2020 (Lindquist, 2006). Other estimates are as high as 76 million retiring (Appelbaum et al., 2012). The need to develop leaders in nonprofit organizations is critical due to the retirements of Baby Boomers. Sixty percent of the organization's executive leadership team are members of the Baby Boomer generation and will be eligible for retirement within the next 5 years (Organizational

Development Manager, personal communication, December 13, 2012). The leadership

and organizational development unit has several goals that focus on growing and

developing leaders (Leadership and Organizational Development Unit Goals, 2014,

October 2013). These goals are relevant to organizations with a high percentage of the

organizations' leadership team currently eligible for retirement.

Leadership development programs and effective transfer of learning processes can

contribute to the sustainability and success of organizations. Some researchers (Baldwin

& Ford, 1988; Farrington, 2011; Leimbach, 2010; Saks & Burke, 2012) suggested that

transfer of learning in organizations is low and of high concern to leaders. Much of the

concerns stem from the significant investments made in training (Farrington, 2011;

Leimbach, 2010). For organizations to maximize their training and development

resources, barriers to the transfer of learning need to be addressed (Aragon & Valle,

2013). In this project study, I evaluated barriers to the transfer of learning and found

areas in need of improvement.

<div align="center">**The Local Problem**</div>

The study site had several divisions. I focused on one division that had two

districts and several affiliate centers. The majority of the sites were located west of the

Mississippi River, and each district had six to eight primary centers and several satellite

centers associated with each main center. The population for this study consisted of 134

employees in the organization who had attended leadership development training

programs since January 2012.

In the organization, there is a high percentage of supervisors and managers who are not transferring skills taught in leadership development training programs back to the workplace (Department Manager, personal communication, September 23, 2012; Human Resource Director, personal communication, February 8, 2012). A lack of transfer of leadership skills to the workplace can negatively impact employee retention and employee satisfaction within an organization (Chatzimouratidis, Theotokas, & Lagoudis, 2012). The organization conducted an employee opinion survey in 2012 that also indicated a lack of transference of skills back to the workplace. Two categories assessed in the survey were management and leadership and my supervisor. Both categories showed a slight decrease in scores over the 2010 survey results. The questions in these categories on the survey directly related to the content taught in leadership development programs. On a 5-point Likert scale, in management and leadership development, one location showed a decrease from 4.04 down to 3.91, and in supervision and creating empowerment and trust, the scores decreased from 4.09 to 3.95. Although not a significant decrease, the decrease in scores, in conjunction with the observations noted by human resources and department managers, indicated that the skills being taught in leadership development programs were not being consistently transferred and applied back on the job. Even at locations where there was not a decrease in the overall scores for these categories, these categories were in the bottom five scores (Employee Opinion Survey Report, 2012, February 16, 2013). The employee opinion survey measured employee satisfaction.

As stated in the Kenexa Research Institute Worktrends Report (2010), there is a direct correlation between employee satisfaction and leadership and managerial effectiveness. Kenexa Research Institute Worktrends Report stated, "Vince Lombardi, legendary American Football coach once said, Leaders are made, they are not born" (p. 19). Building leadership requires providing support and opportunities to allow employees to transfer new skills back to the workplace.

According to Holton, Bates, and Ruona (2000), the first step to improving transfer of learning is to identify the factors that inhibit transfer of learning in the organization. Despite the amount of research conducted on transfer of learning, the role of supervisor support on training transfer is not clearly articulated for all situations. Some authors suggested the environment and supervisor support directly influence training transfer (Heilmann, Bartczak, Hobbs, & Leach, 2013; Ng, 2013; Pham, Segers, & Gijselaers, 2013; Pollock, 2014; Wick, Jefferson, & Pollock, 2015). Other researchers suggested a more indirect influence on training transfer (Chiaburu, Van Dam, & Hutchins, 2010); yet, other scholars showed there is no influence at all (Devos, Dumay, Bonami, Bates, & Holton, 2007). Scholars have not identified factors that inhibit or contribute to transfer of learning in nonprofit organizations from the participants' point of view.

Although the body of research on transfer of learning from professional development programs is substantial, gaps remain on understanding factors that inhibit or contribute to the transfer of learning in nonprofit organizations. Also, few researchers have used a mixed-methods approach to capture data relating to transfer of learning; in this study, I used a mixed-methods approach to address a range of questions and gather

multiple viewpoints from multiple data collection methods (Schindler & Burkholder, 2014). I addressed gaps in practice by examining factors that impact transfer of learning at the nonprofit organization (Wick et al., 2015). Researchers have not provided information on the antecedents of transfer climate or the factors that give rise to work environment perceptions (Professor of Human Resource, Leadership and Organization Development at Louisiana State University, personal communication, April 9, 2014). I focused on the influence of supervisor support toward training and trainees' perceptions of transfer related work environment factors.

<div align="center">**Rationale**</div>

Evidence of the Problem at the Local Level

Transfer of learning for supervisors and managers has been recognized as a problem in the organization. Senior leadership and human resource directors have expressed expectations that participants who attend leadership training will have improved skills in managing employee conflict, be able to communicate fairly and with respect to all employees, administer discipline fairly, and build effective teams (Human Resource Director, personal communication, March 24, 2012; Regional Center Director, personal communication, March 24, 2012; Satellite Center Director, personal communication, July 17, 2013). Leadership and professional development training programs are designed to help supervisors and managers improve these skills.

In this project study, I addressed the gap in practice by examining the relationship between supervisor support or supervisor opposition that inhibit the transfer of learning at the organization. The increased investment in training new supervisors and managers,

pressure for greater accountability for the transference of skills to the workplace, and expectations of senior leadership have created the need to evaluate the application of learning in the workplace for the organization, specifically in the area of leadership development. Additionally, human resource directors, organizational trainers, executive center directors, and center leadership have indicated that inconsistent application of skills taught in leadership development training was occurring in the workplace (Department Manager, personal communication, September 23, 2012; Human Resource Director, personal communication, February 8, 2012; Organizational Trainers, personal communication, March 24, 2012, January 6, 2014). In this study, I examined the relationship between supervisor support or supervisor opposition that hinders transfer of learning for supervisors who have attended leadership development training.

Evidence of the Problem from the Professional Literature

In this study, I examined transfer of learning and factors that impact transfer of learning locally at the nonprofit organization; however, the same problem exists at an international level and has been recognized as a problem at for-profit and nonprofit organizations, as well as public or private organizations. Research had been conducted in the area of transfer of learning from identifying barriers to transfer of training, to providing suggestions for overcoming those barriers (Farrington, 2011; Hutchins, Nimon, Bates, & Holton, 2013). Some of the barriers include limited opportunities to apply the training, lack of motivation from the learners, and work environment factors that include lack of support from supervisors and transfer climate (Brown & McCracken, 2010; Lancaster, Di Milia, & Cameron, 2013; Pham et al., 2013). Although research has

increased in the past several years in the area of transfer of learning, there are still limited data on consistent best practices that are grounded in research and aid in the transfer of training (Schindler & Burkholder, 2014). Additionally, there are few mixed-methods studies on supervisor support and its influence on transfer of training.

Transfer of learning, or the lack of transfer, could be dependent upon many factors, some within the control of the employee and others that are part of the transfer climate or work environment. McCracken, Brown, and O'Kane (2012) identified environment, motivation, and trainer influence as factors that inhibit transfer of training in public sector organizations. Saks (2013) found that meaningful relationships that work environment and supervisor support can also have a positive impact on transfer of learning. Bates, Holton, and Hatala (2012) identified the following 16 factors grouped into four categories that impact transfer of learning.

Trainee Characteristics

- Learner readiness
- Performance self-efficacy

Motivation

- Motivation to transfer learning
- Transfer effort-performance expectations
- Performance-outcomes expectations

Work Environment

- Performance coaching
- Supervisor support

- Supervisor opposition

- Peer support

- Resistance to change

- Personal outcomes-positive

- Personal outcomes—negative

Ability

- Opportunity to use learning

- Personal capacity for transfer

- Perceived content validity

- Transfer design

Organizations that want to improve transferability of skills need to look at all factors that can impact transfer of learning before they can intervene to improve factors that inhibit learning transfer (Ruona, Leimbach, Holton, & Bates, 2002; Saks & Burke-Smalley, 2014). According The American Society for Training and Development (ASTD, 2013b), companies spent billions of dollars on training and developing their employees; yet, few companies evaluated whether the training is being effectively transferred or applied back on the job. Transfer of learning from training to the workplace has been explored by many researchers and has been recognized as a challenge facing organizations, even though there are significantly different views on the specific reasons for the lack of transfer of training (Brown & McCracken, 2010). With so many divergent views on factors supporting or inhibiting transfer of learning, the intent of this study was to research factors that impact transfer of learning at the organization

for supervisors who attend leadership development programs. Data collected from this study can help bridge the connection between leadership training and transference of skills back to the workplace.

Definition of Terms

Learning Transfer Systems Inventory (LTSI): The LTSI is a validated instrument that measures 16 factors affecting transfer of training (Bates et al., 2012; Holton et al., 2000).

Transfer climate: Training climate refers to a person's perception of his or her work environment and is a mediating variable for transfer (Holton et al., 2000).

Transfer of training: Transfer of training and transfer of learning are used interchangeably in this study. Transfer of training is a term that describes the concept that knowledge, skills, and information learned at one point in time influence the application of knowledge and skills when back on the job (Baldwin & Ford, 1988; Bates et al., 2012).

Work environment: The work environment includes all of the conditions that an employee has to perform the tasks and duties belonging to his/her function; factors perceived by trainees to encourage or discourage their use of knowledge, skills, and abilities learned in training in the workplace (Saks, Salas, & Lewis, 2014).

Significance of Study

This study provided evidence of factors that contribute to or hinder the transfer of learning within the organization. This study contributed to the practical framework by looking at the relationship between supervisor support or opposition and the perception

the trainee has on transfer-related work environment factors and may contribute to a

broader understanding of transfer of learning in other for-profit or nonprofit

organizations. Additionally, the data collected could help trainers, developers, and

managers at the study site and other organizations better understand work environment

factors involved in transfer of learning and use that information to provide more effective

strategies to support transfer of professional development skills from the classroom to the

workplace in the future.

Organizations spend billions of dollars in formal training annually to improve

performance, enhance productivity, and develop skills (ASTD, 2013; Green & McGill,

2011). Thus far, scholars have indicated that a large percentage of training does not

transfer back to the job; as little as 10- 20% of training is transferred back to the job

(Ford, Yelon, & Billington, 2011; Grossman & Salas, 2011; Leimbach, 2010; Ng, 2013).

Kazbour and Kazbour (2013) suggested that approximately 20% of training is used on the

job. With organizational pressure to become more efficient, streamline processes and

procedures, and more efficiently allocate resources, organizations need to demonstrate

greater effectiveness of professional development training.

The knowledge gained from this study helped inform decisions, create strategies

to improve transfer of learning, and impact the effectiveness of professional development

training in future courses within the organization. Improving transfer of learning and

improving supervisory performance also has the added benefits of improving employee

satisfaction and increasing employee engagement in the organization (Truss, Shantz,

Soane, Alfes, & Delbridge, 2013). The leadership of this organization should benefit

from knowing the perceived barriers to transfer of learning identified by the participants who have attended leadership development training.

Researchers who have studied transfer of learning demonstrated that transfer of learning is a complex topic and involves multiple factors and influences (Baldwin & Ford, 1988; Blume, Ford, Baldwin, & Huang, 2010). With so many different views on factors supporting or inhibiting transfer of learning, I provided new insights from the participants' point of view that are unique to the organization. Data collected from this study could help bridge the gap between leadership training and transference of skills back to the workplace. The results of this study serve as a catalyst to other leaders in for-profit or nonprofit organizations on identifying factors that impact transfer of learning and aid in developing strategies to overcome the barriers.

Research Questions

The purpose of this study was to examine the relationship between supervisor support or supervisor opposition that hinder transfer of learning for supervisors who have attended leadership development training. Trainee characteristics, training design, and work environment have the potential to influence training transfer (Baldwin & Ford, 1988; Baron & Parent, 2014; Blume et al., 2010; Hunter-Johnson & Closson, 2012). The LTSI was used to identify the relationship between supervisor attitudes towards training and the trainee's perception of transfer related factors that contribute to or hinder transfer of learning. The question guiding the study was the following: What can be done to enhance transfer of learning at the organization for supervisors who attend leadership development training?

Review of the Literature

In the literature review, I focused on factors that contribute to or hinder transfer of training for leadership development programs. Research on transfer of training has gained growing attention over the last 3 decades (Baldwin & Ford, 1988; Gegenfurtner & Vauras, 2012; Gruber, 2013; Holton, 1996; Holton, Bates, Bookter, & Yamkovenko, 2007; Saks, 2013; Veillard, 2012; Volet, 2013). I gathered research related to transfer of learning from a variety of scholarly journals, books, and databases, such as Education Research Complete, ERIC, ProQuest, EBSCO, and PsycINFO. Key search terms included *transfer of training, training transfer, work environment, supervisor support for training, leadership development, workplace learning,* and *LTSI.*

Employee training and development typically involve learning new skills, knowledge, or attitudes in a formal classroom setting that can then be applied to help improve performance back on the job (Hunter-Johnson & Closson, 2012; Pham et al., 2013). What is taught in training should be applied to performance on the job (Wei Tian, Cordery, & Gamble, 2016). However, scholars have concluded that estimates of the amount of training from formal training programs carried back and used to the job can be as low as 10% (Baldwin & Ford, 1988). Saks (2013) found that immediately after training 40% of employees failed to transfer skills taught, and within 1 year, this number jumped to 70%. Other scholars have also shown low transfer rates between training and what the employee transferred back to the workplace (Ford et al., 2011; Ng, 2013; Prieto & Phipps, 2011). Low transfer rates continue to present challenges for organizations and cost organizations billions of dollars annually.

The amount of dollars wasted by not transferring training can high. According to the ASTD (2013), over $160 billion is spent on training investments annually. Employees rely on training and the ability to transfer skills learned to improve their performance and creativity on the job (Martin, 2010). Failure to transfer skills back to the job negatively impacts the organization's training investment and can affect an individual's ability to improve performance (Chiaburu, Sawyer, & Thoroughgood, 2010; Saks & Burke, 2012). Given the research and negative connotations associated with low transfer rates, it is important to determine why employees are not transferring the skills learned.

Theoretical and Conceptual Perspectives

Theories and conceptual frameworks affecting transfer of training will be discussed. There are many theories, models, and concepts identifying factors that influence transfer of training (Baldwin & Ford, 1988; Holton, 1996; Leimbach, 2010; Volet, 2013). A conceptual model of the transfer of training process by Baldwin and Ford (1988) provided the foundation for this study. Baldwin and Ford's model of the transfer process has been the most frequently used framework in the field of transfer of training (Blume et al., 2010). Baldwin and Ford focused on trainee characteristics, training design, and work environment. Baldwin and Ford's model, shown in Figure 1, provided the foundation for several models that have emerged since the creation of Baldwin and Ford's model in 1988 (Blume et al., 2010).
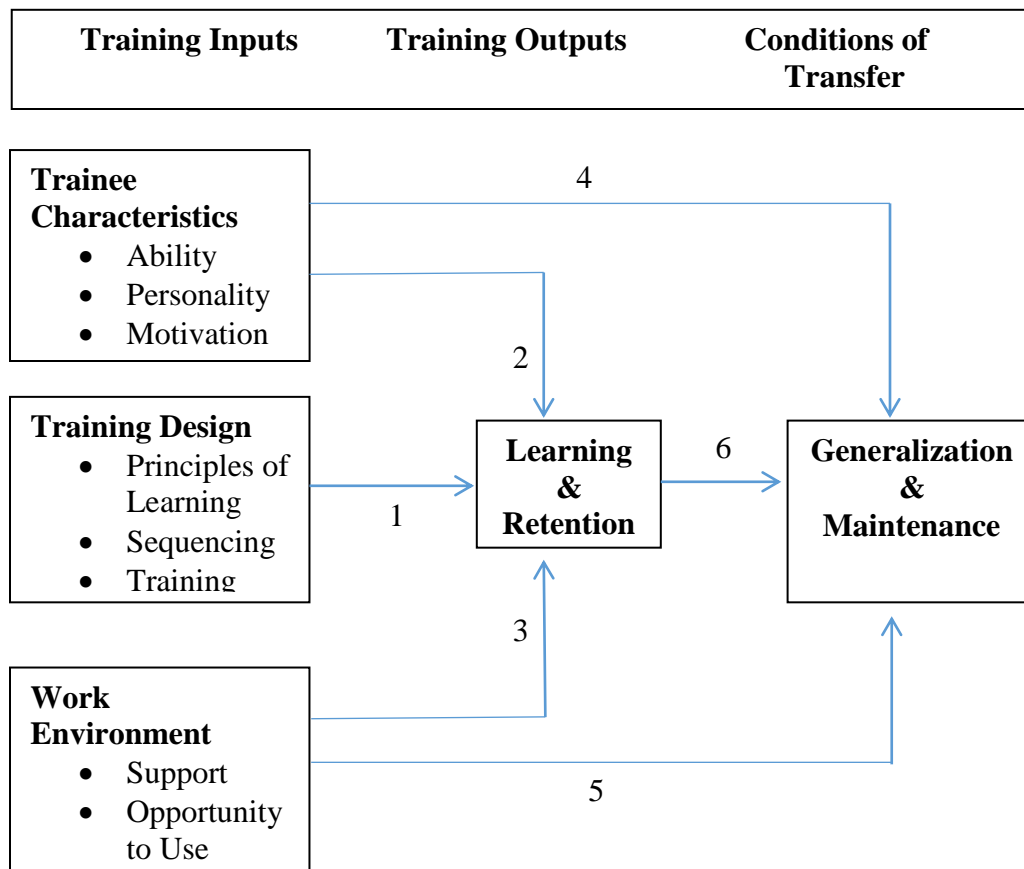
Figure 1. Baldwin and Ford's model of the transfer process factors affecting transfer of training laid the foundation for this study. From "Transfer of Training: A Review and Directions for Future Research" by T. Baldwin and J. Ford, 1988, *Personal Psychology,* p. 65. Copyright 1988 by Personnel Psychology, INC. Reprinted with permission (see Appendix B).

Training inputs include trainee characteristics, work environment, and training design. A trainee may learn the information, but make a conscious or unconscious decision not to use or transfer the skills because of lack of motivation to transfer (Jodlbauer, Selenko, Batinic, & Stiglbauer, 2012). Work environment can also impact training transfer; an individual may learn the skills and not have the opportunity to use the skills back on the job (Hillsman & Kupritz, 2010; Kupritz & Hillsman, 2011). Blume et al. (2010) noted that due to an inconsistent lack of support, there is no one element useful for all training. Content, design, audience, and learning outcomes all impact transfer of training (Blume et al., 2010; Enkuzena & Kliedere, 2011). The importance of training transfer is reflected in the models below.

Holton's (1996) model includes three outcomes of a training intervention: learning, individual performance, and organizational results. Holton's model was originally proposed as an evaluation model; since that time, it has evolved and become the conceptual basis for the LTSI (Holton et al., 2000). The LTSI measures factors related to training transfer that include trainee characteristics, work environment factors, and training design. Holton identified three domains and constructs in each domain that impacted the outcomes in learning, individual performance, and organizational performance. Holton (2005) shared a conceptual model of training that focused on individual performance based on a particular training event and how it impacts transfer of training. According to this model, there are three critical factors that affect transfer of training" motivation to transfer, transfer climate, and transfer design occurring in a single

learning event. Figure 2 shows Holton's revised evaluation research and measurement
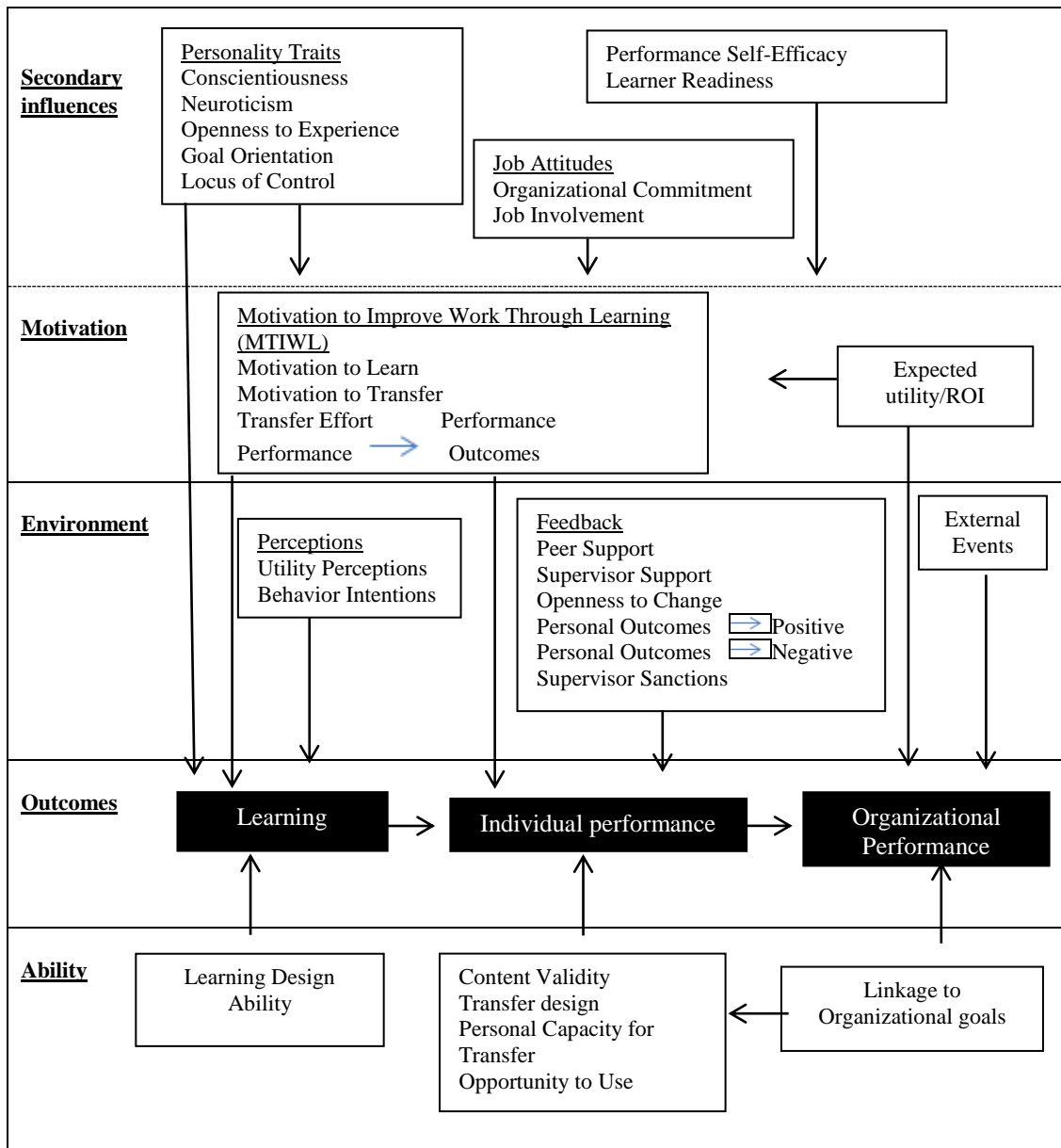
model.

Figure 2. Revised HRD evaluation research and measurement model. From "Holton's evaluation model:

New evidence and construct elaborations," by E. F. Holton III, 2005, *Advances in Developing Human*

Resources, p. 51. Copyright 2005 by Sage Publications. Reprinted with permission. (see Appendix C).

This model takes a more holistic view of transfer of learning and emphasizes a transfer system (Holton et al., 2000; Holton et al., 2007). Learning is of little value unless it results in performance on the job (Dermol & Cater, 2013). Training value is determined by the application of the training to everyday work situations.

According to Holton et al. (2000), research has focused on what Holton et al. called the learning transfer system. Holton (2005) stated, "The learning transfer system is defined as all factors in the person, training, and organization that influence transfer of learning to job performance" (p. 44). Figure 2 shows the conceptual framework created in 2000, based on Holton's (1996) original evaluation model. The LTSI conceptual map laid the foundation for the creation of the LTSI instrument, which was used to collect data for this project study. Permission for the use of the LTSI instrument was obtained from one of the authors, R. Bates, Louisiana State University (Appendix D).

Transfer of Training

The concept of transfer of training is a multifaceted field of study that is referred to as the application of skills gained from training and applied to the workplace (Brown, McCracken, & Hillier, 2013; Homklin, Takahashi, & Techakanont, 2014). Transfer of training is an effective application by program participants of what they learned as a result of attending an education or training program (Baldwin & Ford, 1988; Peters et al., 2014). Trainees who retain information, knowledge, and skills learned at one point and applied it later are transferring learning. Researchers who study transfer of learning recognized that some tools and techniques can either help or hinder the transfer of learning in the workplace (Conger, 2013; Saks & Burke-Smalley, 2014). Trainees need

the tools, resources, and opportunities to be able to apply their new skills in the workplace.

Categories that influence transfer. Baldwin and Ford (1988) were among the first researchers to develop a framework for training transfer and identifying factors that influence it; trainee characteristics, training design, and work environment have the potential to affect training transfer. These broad categories have the ability to affect the transfer of learning outcomes (Baldwin & Ford, 1988; Pham et al., 2013). Trainee characteristics affect a variety of outcomes including job performance, work quality, and employee motivation (Baldwin & Ford, 1988; Blume et al., 2010; De Grip & Sauermann, 2013). Trainee characteristics can have a direct or indirect effect on transfer of learning.

Trainee characteristics. Skills, ability, motivation, and personality are a part of trainee characteristics that influence transfer of training (Blume et al., 2010; Lee, Lee, Lee, & Park, 2014). Scholars have also found a connection between transfer and transfer motivation (Blume et al., 2010; Gegenfurtner & Vauras, 2012). Cheng, Sanders, and Hampson (2015) found that those who reported higher motivation levels were more likely to transfer the skills and knowledge after the training than those who reported low levels of motivation. Noe, Tews, and McConnell Dachner (2010) indicated that both organizational climate and personality influence motivation. Other researchers have also found that personality influences training transfer (Blume et al., 2010; Brinia & Efstathiou, 2012). Training design has also been identified as a factor that impacts transfer of training.

Training design. Another factor that has emerged from the transfer literature is training design. Researchers confirmed that training design directly affects training transfer (Bates et al., 2012; Nesbit, 2012). Training content and instructional methods are part of the training design. Training content also influences motivation to transfer training (Lee et al., 2014; Locht, Dam, & Chiaburu, 2013). If employees perceive training content is related to their jobs, they may be more motivated to transfer the skills back to the workplace (Locht et al., 2013). Not only can content impact transfer of training, but instructional methods also affect transfer of training (Renta-Davids, Jiménez-González, Fandos-Garrido, & González-Soto, 2014). Active training methods positively influence training transfer (Noe et al., 2010). Active training is based on the premise that participants are involved and active in the learning process rather than passive observers. Trainee characteristics and training design are not the only factors that influence training transfer; work environment factors play a part in hindering or helping transfer of training (Ladyshewsky & Flavell, 2011). Past researchers have established a direct or indirect relationship between transfer of learning and work environment factors.

Work environment. Work environment factors include organizational culture, transfer climate, peer support, and supervisor support. Blume et al. (2010) suggested that supervisor support is an underrecognized work environment factor that affects transfer of training. Supervisors and peers have an impact on whether training is used in the workplace (Sitzmann & Weinhardt, 2015; Yasin et al., 2013). Blume et al. found "specifically, most predictor variables examined (e.g., motivation, work environment) had stronger relationships to transfer of training when the focus of the training was on

open (e.g., leadership development) as opposed to closed (e.g., computer software) skills"

(p. 1065). The LTSI has four sets of factors: motivation, work environment, ability, and

secondary influences (Holton et al., 2000). According to Holton et al. (2000),

motivation, work environment, and ability directly influence an individuals' performance

whereas secondary influences (also known as trainee characteristics) may affect

motivation and may impact an individual's performance.

Organizational culture influences behaviors of employees in an organization.

Yamnill and McLean (2005) concluded that organizational cultures influence transfer of

training in Thailand. Scholars also showed the influence of organizational culture on

transfer of training in the U.S. (Anderson-Cousins, 2013; Blume et al., 2010; Holton et

al., 2000). Futris, Schramm, Richardson, and Lee (2015) and Nikandrou, Brinia, and

Bereri (2009) found that organizational culture can support or hinder training transfer.

Nikandrou et al. found that skills were less likely to be attempted if the individuals

believed they would be ridiculed for using the skills on the job.

Transfer climate is sometimes referred to as organizational climate in the

literature. Transfer climate includes work environment factors such as peer support and

supervisor support, as well as perceptions of opportunities to use learned skills back on

the job (Holton et al., 2000; Pham et al., 2013). Work environments including supervisor

and peer support that support transfer of training have been called transfer climates

(Peters et al., 2014; Rouiller & Goldstein, 1993; Tracey, Tannenbaum, & Kavanaugh,

1995). There have been numerous researchers who have looked at transfer climate and

have produced inconsistent or conflicting results on what factors have an impact or

transfer of learning (Chun-Chieh & Hsiao-Ping, 2013; Holton, Bates, Seyler, & Carvalho, 1997). For example, Holton et al. (1997, 2000) found that peer and supervisor support reflected transfer climate more accurately than other environment signs.

Peer support refers to the degree that peers reinforce and support their coworkers in the use of knowledge and skills learned in training (Holton et al., 2000). Peer support and supervisor support influences transfer of training (Blume et al., 2010; Lee et al., 2014; Sookhai & Budworth, 2010). However, there is still a lack of empirical research on supervisor support or supervisor opposition and its effects on transfer of training at nonprofit organizations.

Supervisor support refers to "the extent to which supervisors support and reinforce the use of training on the job" (Holton et al., 2000, p. 345). Existing research on the role of supervisor support and the impact it has on the transfer of training is inconsistent. Despite the amount of research conducted on transfer of learning, the role of supervisor support on training transfer is still not clearly articulated. Several researchers suggested that the environment and supervisor support directly influence training transfer (Schindler & Burkholder, 2014; Wick et al., 2015). Supervisors play a role in transfer of training; organizations should find ways to promote and encourage more supervisor support in the work environment for training (Blume et al., 2010; Ng, 2013). Measuring and evaluating transfer of learning also play a role in the transfer of training.

Measurement and Evaluation

Measuring the effectiveness of training programs consumes valuable time and resources, and in today's economy, it is more important than ever that resources are used efficiently. Many training programs fail to achieve the expected outcomes and a lot of money is being wasted by U.S. corporations if training is not achieving the desired outcomes (ASTD, 2013b). Baldwin and Ford (1988) have estimated that less than 10% of training produced behavioral changes; other studies supported that estimate (Brown et al., 2013; Ford et al., 2011). Measuring transfer of learning can help detect the reasons why the skills are not being transferred to the workplace. One method of evaluation is Kirkpatrick's (1978) four level model of training evaluation first described in 1959. This model is still one of the most widely used models in the workplace today (Kirkpatrick, 2006; Saks & Burke, 2012). The four levels in Kirkpatrick's (1978) model are:

1. Level 1 reaction, how does a learner initially react to the training?
2. Level 2 learning, what did the learners actually learn?
3. Level 3 behavior, what changes in job performance occurred as a result of the training?
4. Level 4 results, what are the tangible results regarding cost savings, improved productivity, efficiency, etc.?

While Kirkpatrick's evaluation model is still widely used today for evaluating and assessing the effectiveness of training, several researchers have identified limitations of the model (Baldwin & Ford, 1988; Saks & Burke, 2012). During the late 1980's, a number of other models were developed to describe components of the transfer process.

Baldwin and Ford (1988) created a model to explain the training transfer process that included training inputs, training outcomes, and conditions for transfer of training. Training inputs included trainee characteristics, training design, and work environment variables. Training outputs focused on learning and retention, and training conditions included generalization and maintenance. Blume et al. (2010) provided expanded insights on transfer conditions and the components of generalization and maintenance: "generalization of knowledge and skills acquired in training to the job and maintenance of that learning over time on the job" (p. 1068). Brinkerhoff's (1989) model added two preliminary levels to Kirkpatrick's model, to provide formative evaluation of training needs and the training design. There are some limitations with this model since it consists of both summative and formative evaluation, which is only possible in ideal situations and training organizers are not competing for budget or time (Holton & Naquin, 2004). Research continued on transfer models.

During the 1990s, researchers sought to test variables associated with transfer models, specifically Noe's model and Baldwin and Ford's model (Cheng & Hampson, 2008). Holton (1996) was critical of Kirkpatrick's four levels of evaluation, stating the model was more of a taxonomy then an evaluation model. Holton's (1996) model (Holton, 2005) includes three outcomes: learning, individual performance, and organizational results. Holton et al. (2000) continued to research transfer of learning and proposed a new term "transfer system," which is defined as all factors in a person, training, and organization that influence transfer of learning. In further work, Holton and his colleagues developed the LTSI (Holton et al., 2000). In the past ten years (Bates et

al., 2012) the LTSI has been validated and revised several times to clarify different

factors and condense the number of questions.

Implications

Significant resources are invested in employee training every year (American

Society for Training and Development, 2013b; Liao, Mo, & Grant, 2011; Vidal-Salazar,

Hurtado-Torres, & Matías-Reche, 2012). A lack of actual transfer of training impacts an

organization's training investment and can affect an individual's ability to improve

performance (Liao et al., 2011; Saks & Burke, 2012). The findings from this study have

particular application for the organization in creating strategies to support the transfer of

learning in the workplace. The results of this study showed support from supervisors has

a positive impact on transfer of learning. Likewise, Hua, Ahmad, and Ismail (2011) in

their study found the ability of supervisors to reinforce training in the workplace

positively impacts transfer of learning. Culpin, Eichenberg, Hayward, and Abraham

(2014) found that management support "contributed to both actual and intended transfer"

in an executive development program (p. 144). As a result of the analysis of the data

collected during this study, the best option for a project is the creation of policy

recommendations to support the leaders' involvement in the learning process and provide

opportunities for participants who attend leadership development programs to use the

skills taught in training back in the workplace.

Summary

This section has shared a local problem, rationale, guiding research questions,

review of the literature, and implications for improving the transfer of training in the

workplace. The research on transfer of training in the workplace has continued to increase in the past several decades. Research findings showed several factors can hinder or help the transfer of training in the workplace (Baldwin & Ford, 1988; Holton et al., 2000; Veillard, 2012; Volet, 2013). Individual characteristics, training design, and work environment factors all influence transfer of training (Gegenfurtner & Vauras, 2012; Gruber, 2013; Veillard, 2012; Volet, 2013). Some studies showed that the environment and supervisor support directly influence training transfer (Pham et al., 2013; Wick et al., 2015), while other studies indicated a less direct impact or no influence at all (Chiaburu et al., 2010; Ng, 2013). Pham et al. (2013) also found meaningful relationships between the potential that work environment and supervisor support have an impact on transfer of learning, yet additional research needs to be conducted to identify strategies and solutions to ensure a positive impact on transferring skills to the workplace.

The purpose of this study is to examine the relationship between supervisor support or supervisor opposition that hinder the transfer of learning for supervisors who have attended leadership development training. The next section of this study will focus on the research methodology, setting, sample, and methods used to protect participants, data collection, instrumentation, materials, data analysis, assumptions, and limitations.

Section 2: The Methodology

Research Design and Approach

A mixed-method, sequential, explanatory study was conducted over an 8-week data collection period. In this study, I investigated factors contributing to the on-the-job use of learning acquired in professional development training programs. To achieve the goal of this study, I obtained quantitative data from a survey, followed by individual interviews, to explore the results in more detail.

Data collection involved two phases. In Phase 1, quantitative research was used to address the work environment factors at the organization that contributes to the ability to transfer professional development skills back to the workplace. In Phase 2, qualitative interviews were used to clarify further what can be done to enhance future transfer of learning. Figure 3 shows a visual description of the approach.
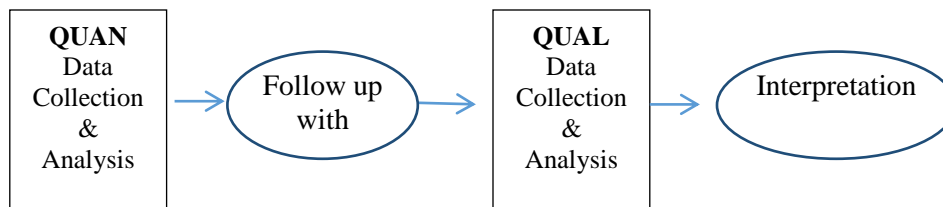
Figure 3. Sequential explanatory design used to guide this project study. From Educational research: planning, conducting, and evaluating quantitative and qualitative research (4th ed.). by J. W. Creswell, 2012. NJ: Upper Saddle River, p. 541. Copyright 2012 by Pearson Education reprinted with permission (see Appendix E).

Survey research has been used to measure transfer of learning and is useful for measuring attitudes, perceptions, and behaviors (Liebermann & Hoffmann, 2008). Data for this study were collected sequentially. Phase 1, the quantitative portion of this study, began with collecting data using the LTSI instrument (see Appendix F). The LTSI v.4 provided the quantitative data and opinions from the sample population on work environment factors impacting transfer of training and the ability to use the information on the job. The survey also provided a less threatening way for participants to respond openly and honestly to questions and express their views and opinions (Preisendörfer & Wolter, 2014). This was followed by Phase 2 using a qualitative approach and conducting one-on-one interviews to better understand the research problem (Creswell, 2012; Creswell & Plano Clark, 2011). The interviews contained open-ended questions and provided an opportunity for select participants to impart deeper insights into the transfer of learning strategies at the organization.

A mixed-method, sequential, explanatory study allowed me to explain quantitative results by using a qualitative approach to clarify and fill in any gaps in the information obtained from the quantitative data (Creswell, 2012; Creswell & Plano Clark, 2011). I chose a mixed-methods approach because it allowed for multiple viewpoints from multiple data collection methods. Collecting data using both quantitative and qualitative methods and two different tools enhanced the credibility and validity of the findings. Creswell (2012) indicated that mixing and analyzing both quantitative and qualitative data can help the researchers better understand the research problem and explain the quantitative results greater detail. By providing statistical information backed

by qualitative data, more significant insights into the research problem were obtained and allowed a robust project to be developed to address the transfer of learning at the organization.

Phase 1: Quantitative Methodology

Setting and Sample

The setting for this study was a nonprofit organization with multiple business divisions and locations across the United States. In this study, I focused on one division with two districts and several affiliate centers. The target population for this study consisted of employees who had attended leadership development courses within the organization between July 2012 and July 2014. One-hundred-thirty-four participants met this criterion. This number was significantly lower than the 200 participants initially identified, due to reductions in force and terminations in the organization. The complete list of participants' names was obtained from a report ran using the organizations' training tracking software.

Convenience sampling was used for the quantitative portion of this study. Convenience sampling involved selecting participants because the participants were easily accessible to me. A convenience sample is used when people are available and willing to participate in the survey (Creswell, 2012; Robinson, 2014). The sample can provide useful information for answering questions (Creswell, 2012). The original sample size identified for the quantitative portion of the study was 115 participants to achieve a 90% confidence level with a 0.05 margin of error. With such a small sample size ($N = 60$), using a formula to determine adequate sample size for sampling error was

not adequate (Creswell, 2009). In addition, Lodico, Spaulding, and Voegtle (2010) and

Creswell (2009) suggested sampling the entire population if the population was 200 or

fewer.

       Participant protection. Before I began collecting any data for this project study,

permission from the Walden University's Institutional Review Board (IRB) was obtained

for both the quantitative and qualitative phases of this research study. The function of an

IRB is to ensure review of ethical procedures to be used in conducting the research.

Obtaining permission included submitting an application stating the purpose of the study

and sending copies of the consent forms to be used for both phases. The Walden IRB

approval for the study was # 08-29-14-0178848, and it expired on 8/28/15. I created

consent forms for participation in the survey and the interview. The consent forms

included an introduction to me; the purpose of the study; a description of the study; and a

discussion of benefits, compensation, or risks associated with participating in the study.

The consent form also included a section that stated participation in the study was

confidential and voluntary. All documentation, including the recorded interviews, are

kept in a locked file in my home office or are password-protected and kept on my

computer or my personal password-protected external drive as backup.

Quantitative Data Collection Strategies

       Using a mixed-methods strategy allows a researcher to collect data using both

quantitative and qualitative approaches. Collecting quantitative data allows information

to be gathered from a larger number of participants. The first step in the quantitative

process of this study was to obtain a letter of cooperation from the organization. Access

to participants was gained through an initial e-mail contact to identify interest in

participating; the e-mail included the informed consent letter. In the e-mail, I introduced

the study and asked participants to sign and return the consent letter if they were

interested in participating in the research. During the quantitative portion of the

sequential explanatory study, an online survey of the LTSI was sent to 115 participants

via an e-mail. The survey was distributed using Kwiksurveys, an online survey tool. The

initial e-mail request resulted in 47 participants responding and completing the survey.

To gain a greater response, two more e-mails were sent out over the following 2 weeks.

Sixty ($N = 60$) completed surveys were received from participants for a 52% response

rate.

Quantitative data collection instrument. Data for the quantitative portion of the

study were collected online using Kwiksurveys.com to collect the LTSI data. Bates et al.

(2012) stated, "The LTSI is an empirically derived self-report 16-factor inventory

designed to assess individual perceptions of catalysts and barriers to the transfer of

learning" (p. 549). Appendix G lists the 16 scales and the associated definitions. The

first version of the LTSI was developed by Holton and Bates in 1997 and consisted of 63

items (Bates et al., 2012). Since that time, several revisions have been made to the

instrument based on additional research and analysis. LTSI v.4 (see Appendix F), revised

in 2008, is the latest version of the tool. The LTSI assesses factors that are critical to the

transfer of learning and measures these factors based on the learner's responses using a 5-

point Likert scale ranging from 1 = *strongly disagree* to 5 = *strongly agree* (Bates et al.,

2012; Holton et al., 1997). The LTSI v.4 contains 55 questions, and the first 48 questions

measure 16 different factors that influence the transfer of learning. These 16 factors are grouped into four categories: trainee characteristics, motivation, work environment, and ability. A list of questions is included in Appendix F.

All four categories were used to answer RQ 1: What is the relationship between supervisor attitudes towards training and the trainee's perception of transfer related factors? Question 49 identified the title of the program, and was modified to state *in the last leadership training you have attended.* This modification was made based on the recommendations from the author of the instrument (R. Bates, personal communication, April 4, 2014) and to better support the focus of this project study. Questions 51 through 55 contained demographic and training-program-related questions. Permission has been granted to use the LTSI instrument (see Appendix D). Table 1 shows a summary of the research question, data collection methods, and data analysis for the quantitative phase.

Table 1

Phase 1. Summary of Questions, Data Collection and Analysis

Research question	Data collection methods	Data analysis methods
RQ1 What is the relationship between supervisor attitudes towards training and the trainee's perception of transfer related factors?	Supervisor Support LTSI Questions 21,22,26 Supervisor opposition LTSI Questions 23,24,25 Transfer of learning (TOL) was indicated by calculating the mean score of each participant across 14 of the 16 factors of the LTSI. The factors of supervisor support and supervisor opposition were omitted in calculating TOL.	Descriptive analysis, correlational analysis, multiple regression

Quantitative data collection method. The LTSI survey that I used in this study was administered using an online tool called Kwiksurveys. The surveys were distributed to all participants who attended a leadership training program between July 2012 and July 2014. The e-mail included a link to the survey, a copy of the consent form, an explanation of the purpose of the study, and a request for participant agreement to participate in the study. In addition, I provided the participants with my contact information and contact information of Walden IRB in the event they had questions concerning the study. Participants were asked to sign and return the informed consent prior to completing the survey. Participants were given 2 weeks to complete the survey. I sent a follow-up e-mail 1 week after the initial e-mail was sent to remind participants to complete the survey. Initial response rate included 47 responses; two additional e-mails were sent 1 week apart to request further participation. A total of 60 participants responded to the survey.

All data that I collected were confidential. This was indicated in the e-mail invitation requesting participation. The data gathered and analyzed by this instrument will be maintained for 5 years after data collection and are kept in my home office in a locked file cabinet, or stored electronically on my personal, password-protected computer.

Validity of the instrument. The LTSI instrument has shown content and criterion validity, as well as convergent and divergent validity (Bates et al., 2012). Devos et al. (2007) conducted a study with the French version of the LTSI to examine predictive validity. Seven factors showed statistically significant correlations with transfer of

training, learner readiness, the opportunity to use, transfer performance, and self-efficacy

being significant at the 0.01 level, and transfer design and motivation to transfer being

significant at the 0.001 level. Bates et al. (2012) stated, "The LTSI has been translated

into 17 different languages, and several of these studies have provided evidence that

supports the 16-factor structure" (p. 551). Velada, Caetano, Bates, and Holton (2009)

and Yaghi, Goodman, Holton, and Bates (2008) have validated the LTSI in research

studies in Portugal and Jordan.

Several other scholars focused on criterion validity, motivational factors, and

environmental factors (Bates et al., 2012; Hutchins et al., 2013; Peters et al., 2014).

Bates et al. (2012) conducted another validation study that included data collected over a

10-year period. This study included 5,990 participates from 17 countries, and 14

different language versions of the LTSI (Bates et al., 2012). Prior research was limited to

exploratory factor analysis (EFA); this study looked at both EFA and confirmatory factor

analysis (CFA) which is considered a strong test of factorial validity (Bates et al., 2012).

The overall results of the EFA supported the 16-factor structure of the LTSI (Bates et al.,

2012). The CFA results showed that the data supported the hypothesized data and

indicated that there was little overlap between the scales and each scale assesses what it

was designed to assess (Bates et al., 2012; Hutchins et al., 2013). The results of this

research led to the creation of a shorter version of the LTSI, Version 4 (Appendix F) that

was the version used in this study. Velada et al. (2009) conducted a study in Portugal to

analyze construct validity; Velada et al. found that the primary factors impacting the

transfer of learning in Portugal were the same as the factors affecting the transfer of learning in the United States.

Reliability of the instrument. Reliability demonstrates that scores from an instrument are consistent, and results should be the same or similar when the instrument is administered at different times and with different audiences (Creswell, 2012). The LTSI instrument has been tested with proven reliability by many years of research with over 7,000 participants, in many different job settings and different countries (Bates et al., 2012; Holton et al., 2000). Several scholars have provided evidence of criterion-related reliability of the LTSI instrument since its inception. Holton et al. (2007) used factorial analysis on an instrument based on frameworks and instruments originally suggested by Rouiller and Goldstein (1993), which resulted in the creation of the LTSI developed by Holton and Bates. The LTSI has shown evidence of the convergent and divergent validity of the scales and criterion-related validity (Holton et al., 2007). Holton et al. (2000) examined Version 2 of the LTSI that included 112 questions, testing for validity and reliability; based on the results of this study, they created Version 3 of the LTSI, reducing the number of items from 112 down to 68 items. The reliability of the items on the LTSI was measured from the interpretation of the Cronbach's alpha coefficient, if an item is .70 or higher, that indicates a very high reliability (Creswell, 2012). Holton et al. (2000) stated, "Reliability of all 16 scales were acceptable, with only three scales having reliabilities below .70" (p. 355). The three scales with reliability below .70 were supervisor sanctions .63, personal capacity for transfer .68, and personal positive outcomes .69 (Holton et al., 2000, p. 355). Kirwan and Birchall (2006) tested

transfer of learning for management development programs and found a high reliability for all 16 scales. The reliability coefficients for 14 of the 16 scales were at or above α = 0.70. The two scales that were below were negative personal outcomes α = 0.68 and personal capacity for transfer α = 0.62 (Kirwan & Birchall, 2006, p. 258), which is still within an acceptable range for reliability. Devos et al. (2007), Velada et al. (2009), and Bates et al. (2012) also tested the reliability and the results were consistent with the results identified above and indicated that the LTSI is not only valid but also reliable as well.

Quantitative data analysis. Once the participants completed the online LTSI survey and all the data had been collected, I complied a spreadsheet containing data from the 48 LTSI questions and the nine demographic questions and reviewed the responses for completeness. All submissions were complete. Data were sent to the LTSI authors for scale score analysis, then exported into the Statistical Package for Social Sciences v21 (SPSS) for descriptive and correlational analysis. Proprietary scored-scale information for the LTSI survey was not available for publication in this document as a condition on the use of the LTSI. However, statistical analysis was conducted by the instrument authors and returned to me for further statistical analysis.

I conducted descriptive analyses that focused on the mean, median, and mode. Correlational analysis was conducted to look for an association between variables, and reliability testing was performed using Cronbach's alpha testing to measure each LTSI scale. The LTSI has 16 scales (Appendix G), those scales achieving a Cronbach's alpha testing of .60 or higher were kept. If an item is .60 or greater, that indicates an acceptable

level (Creswell, 2012). Multiple regression analysis was used to determine if there is was

a significant relationship between the dependent variable of transfer of learning and the

independent variables of supervisor support and supervisor opposition.

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Phase 2: Qualitative Methodology

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Setting and Sample

   I used convenience sampling for the quantitative method preceding the purposeful

sampling used for Phase 2, the qualitative portion of this study. The population for the

qualitative phase of the study consisted of participants in Phase 1 that completed the

LTSI and volunteered to participate in the interview process. Purposeful sampling is

"selecting participants or information that will best help the researcher understand the

problem or question being researched" (Creswell, 2012, p. 206). Purposeful sampling

was relevant for this study as I selected participants to participate in the interviews based

on their survey responses specific to their perceptions regarding supervisor support or

supervisor opposition. Thirty participants of Phase 1 volunteered to take part in the

interview process. The 30 volunteers were categorized into two groups based on their

responses to the questions on the survey regarding supervisor support. Twelve volunteers

scored 2.66 or lower on the LTSI supervisor support scale, and fourteen volunteers

scored 3.0 or higher indicating more supervisor support. Interviews were conducted with

eight participants ($N = 8$), four randomly selected from each group of those who showed

strong supervisor support and those participants who indicated lower supervisor support

based on a score of 2.6 or lower. Once the participants of Phase 2 had been identified,

contacted, and participated in the interview process, all identifying information was

removed from the survey. This sample enabled me to answer RQ2 and identify areas that can enhance transfer of learning for participants who attend leadership development courses.

While sample sizes vary in qualitative research, it is common for the sample size to be small due to the complexity of the information collected or the time involved collecting the data (Creswell, 2009). The sample size identified provided useful information and specifics on the influence of supervisor attitudes toward training and trainees perceptions of transfer related work environment factors. "A sample size of eight interviews may be sufficient to enable development of meaningful themes" and saturation of findings (Guest, Bunce, & Johnson, 2006, p. 78). The sample size must be large enough to ensure that the researcher is likely to hear most of the perceptions that might be essential to the study.

Researcher-participant relationship. To establish a researcher-participant relationship and build rapport, I thoroughly explained the purpose of the study and defined transfer of learning to begin building rapport. Creating rapport and trust is vital to building relationships (Creswell, 2012; Lodico et al., 2010). I established open lines of communication and provided participants with contact information to include an e-mail address and my personal cell phone number. In addition, I adhered to the timelines established before each interview, listened and asked probing questions if appropriate, and kept an open line of communication to strive to build trust and establish rapport.

Qualitative Data Collection Strategies

Gaining access to the participants involves obtaining permission (Creswell, 2012). Permission for me to conduct this study was granted from the organization's Director of Learning and Organizational Development. As previously stated, purposeful sampling was used to select participants for the qualitative portion of the study. The sample was selected from those who volunteered to participate and have indicated high or low supervisor support for the transfer of learning.

Interview protocol. An interview protocol (see Appendix H) was designed to guide the interview and keep the interviewer on track (Creswell, 2012; Patton, 2015). The first step was to determine the purpose of the interviews. The purpose of the interviews was to gather information on factors that contribute to or hinder transfer of training back to the workplace. The next step was to create the interview protocol and to include a welcome message, the duration and procedure of the interview, verifying consent, reminding individuals the interview would be recorded, interview questions, and a wrap up thanking individuals for their participation in the interview process.

The questions for this interview protocol were created to help answer RQ2: What can be done to enhance transfer of learning at the organization for supervisors who attend professional development training? The formulation of probe questions also helped to guide the interview process. The open-ended interview questions focused on: (a) what contributes to and hinders participants' ability to use skills taught in leadership development courses in the workplace, (b) what else influences whether or not participants use skills taught in the leadership development program they attended back at

work, (c) in what ways does participants' immediate supervisor play a role in whether or not participants use the skills taught in the recent leadership development program you attended, and (d) participants' suggestions or recommendations that would help supervisors in implementing the leadership skills taught in training. In addition, two wrap up questions gave the interviewees the opportunity to add anything additional that I may not have asked.   Once the interview protocol was created, an interview protocol test was conducted. The interview protocol test and the adjustments to the interview protocol are discussed in the next section.

       Interview protocol test. The interview protocol test was completed prior to conducting the interviews and collecting the data. The interview protocol test included sending invitations to two participants who agreed to participate in the interview and who had participated in the LTSI questionnaire protocol test. The results of the protocol test showed that the interviews include adding an introduction on what transfer of learning was, rearranging the order of the questions, and moving Interview Question 1: In what ways does your immediate supervisor play a role in whether or not you use the skills taught in the recent leadership development program you attended? down to Inteview Question 4. I incorporated the participant feedback into the final interview protocol.

       Qualitative data collection method. Over a period of two weeks, I collected qualitative data for this study by conducting semistructured interviews with eight participants to answer RQ2: What can be done to enhance transfer of learning at the organization for supervisors who attend professional development training? The participants were selected after I collected and analyzed the data from the quantitative

phase of the study. The interview data collection process began by contacting by phone

or e-mail the initial eight participants that were selected to participate in the interview

process. After contacting the participants, I confirmed their intent to participant in the

interview process and arranged a date and time that was convenient to the participant to

conduct telephone interviews with each of the participants. Each interview lasted

between 15 and 35 minutes.

Each interview was conducted via telephone, audiotaped, using a digital recorder,

and transcribed. Permission to record interviews was requested on the Informed Consent

Form and again at the beginning of the interview. Verbal confirmation was also received

before each interview to ensure the participant still wanted to volunteer and participate in

the qualitative interview phase of the research. I informed each individual that

participation was voluntary, and he/she could withdraw from the research or stop the

interview at any time without harm or retribution. The interview questions were

predetermined and were linked to the rationale of the sequential explanatory study to

follow up on the results from the quantitative data collected. Interviewees were asked

five interview questions and two wrap-up questions that were linked to RQ2. Probing

questions were also created to help guide the interview process (Bogdan & Biklen, 2007).

The interviews were digitally recorded and I took limited manual notes during the

interviews. At the beginning of the interview process, participants were also told that

they would be requested to check the transcripts at a later date. Within one week of the

interview, participants were provided with transcribed copies of their interviews and

given the opportunity to review and dispute any of the information. No changes were

suggested by the participants as a result of their reviews. All data collected by me are

confidential, and this was indicated in the e-mail invitation requesting participation. The

data collected and analyzed from these interviews are kept in my home office in a locked

file cabinet or stored electronically on my personal computer and password protected.

Table 2 shows a summary of the research question, data collection methods, and

data analysis for the quantitative phase.

Table 2

Phase 2. Summary of Questions, Data Collection and Analysis Methods

Research question	Data collection methods	Data analysis methods
RQ2 What information, practices, and recommendations should supervisors provide to enhance transfer of learning?	Interview Questions 1,2,3,4,5,6,7	Qualitative interviews were conducted (*N*=8). Coding creating categories and content analysis

Trustworthiness. According to Lincoln and Guba (1985) trustworthiness is

based on four criteria; credibility, dependability, confirmability, and transferability.

These four criteria improve believability of qualitative research (Anney, 2014).

Credibility refers to how accurate the findings are given the data collected (Creswell,

2012; Houghton, Casey, Shaw, & Murphy, 2013). Ensuring that the interpretation and

findings from data collected are accurate is critical for meaningful qualitative research

(Creswell, 2012). While there is little consensus on specific measures to enhance the

quality and credibility of qualitative studies, there is agreement that the researcher should

use multiple approaches (Anney, 2014; Creswell, 2009; Creswell, 2012; Leung, 2015;

Palinkas et al., 2015). Credibility is how consistent the findings are with reality (Anney,

2014; Lincoln & Guba, 1985).   Member checks and peer review were used to determine credibility of the findings of this study.

Member checks, also known as respondent validation or informant feedback, is one common strategy used by researchers to solicit feedback on the accuracy of the information from the participants that have been interviewed (Creswell, 2012). Member checking serves to decrease incorrect or inaccurate information and can occur during the interview or closer to the end of the project (Anney, 2014; Creswell, 2012; Leung, 2015). I chose to conduct member checking both during the interview and toward the end of the project.

Throughout the interview process member checks were conducted to validate the information from the participants. I summarized the data and provided an opportunity for participants to address the adequacy of the data during the interview process. The following illustrates an example of the member checking exchange:

> Interviewee: The biggest this is to give people a chance to do it. We are so
> overwhelmed with our work; we have to put things on the back burner.
> Researcher: Can you expand on what would help in giving you a chance to
> practice those skills?
> Interviewee: If I'm really busy or tied up I don't get a chance to practice and I
> don't want to use the skills on someone without practice. Don't make us so
> frantic in our work that we don't take the time to get better.
> Researcher: So what I hear is that finding the time to practice the skills before
> you are in a situation where you need to use them would help. Is that correct?

Interviewee: Yes.

In addition, after conducting the interviews, I transcribed each interview and sent a transcript to each individual from whom the data were obtained to verify and validate that I accurately captured the data from the participant's perspective (see Appendix I). This action provided the participants the opportunity to review the responses recorded, clarify any misunderstandings, and raise any concerns to me. All participants agreed that the data accurately reflected their answers to the interview questions. If any data directly identified an individual those data were not reflected in the data analysis.

The second strategy utilized to ensure credibility of the study was peer review, also known as peer examination. Peer review is another form of quality control that includes one or more people of similar knowledge of the topic to review and ask questions about the data collected (Houghton et al., 2013; Merriam, 2009). I shared the results of the qualitative data analysis with two peer reviewers, both who were familiar with training in the organization. One reviewer was new to the topic of transfer of training, the second reviewer worked in training and development and was very familiar with transfer of training. The peer review included having the colleagues scan some of the raw data, ask questions, and gage if the findings were conceivable from their point of view based on the raw data. The peer reviewers did not have access to identifiable data. The peer reviewers examined the interview transcripts, researcher's nots, and qualitative data analysis and results, asked questions, offered comments and considered alternative ways to look at the data.

Dependability and confirmability are closely linked. Dependability refers to participants reviewing the findings and interpretation of the data. Dependability in strengthened by using triangulation and member checks. Member checks were conducted throughout the interview process and after transcripts were prepared to validate the information from the participants. Another way to address dependability is to document the processes used within the study to enable future researchers to be able to repeat the work (Anney, 2014). This project study has documented the processes and procedures used and I have maintained the raw data and notes collected from the participants. Maintaining the raw data creates an audit trail. An audit trail also helps establish confirmability (Lincoln & Guba, 1985). Confirmability is the degree to which the results of the study can be confirmed by other researchers (Anney, 2014; Rhodes & Martin, 2013; Lodico et al., 2010). The goal for confirmability in this study was to confirm the findings and ensure the participants' views were accurately represented.

Transferability refers to whether or not the results can be applied to similar situations or populations (Anney, 2014; Merriam, 2009). Providing solid descriptive data increases the study's ability to transfer to other applications and allows for comparison of data to other possible contexts (Houghton et al., 2013). This final report provides detailed and appropriate descriptions so that readers can make informed decisions about the relevancy of the findings in similar situations.

Researcher role. As the Manager of Training and Organizational Development at the organization where the study was conducted, I have provided training to some of the target population. In this role, I routinely trained employees at several of the locations

being represented in this study. I have also worked closely with supervisors and

managers at several of the locations that may be described in this research project. I had

a professional relationship with the employees and my previous role in training

participants who volunteered for the study had no impact on the study.

      Qualitative data analysis. The data from the qualitative portion were analyzed

to create a better understanding of what information, practices, and recommendations

should supervisors provide to enhance transfer of learning. The qualitative data were

collected during the interview process and simultaneously reviewed, coded, and analyzed

while continuing to conduct interviews. Data from the interviews were analyzed using an

inductive method which is typical in conducting qualitative research (Creswell, 2012;

Lodico et al., 2010). I recorded all interviews. The first step in the analysis process was

to transcribe the data into written form. Each participant received a copy of the

transcribed data through e-mail. The participants were asked to review the transcripts for

accuracy and to let me know if any changes needed to be made to the transcripts. None

of the participants requested changes. I read and reread all the transcripts several times.

The next step involved coding and organizing the data into categories and themes. Data

analysis consisted of getting a sense of the data, coding, and creating themes to make

sense of the data collected (Creswell, 2012). The findings are reported in the form of a

detailed narrative.

      Coding and emerging themes. Merriam (2009) stated that it is important to

assign codes to data to begin identifying emerging themes. I began the coding process by

loading key words and phrases from the transcripts into Microsoft Excel to organize and

color code emerging themes. Using Excel allowed me to make comments, begin

recording general ideas and sort the information. Each individual transcript was given an

alphanumerical code to replace the interviewees name and to ensure participant

confidentiality.

A thematic analysis was used to analyze the data and sort into categories and

themes. Thematic analysis helps to identify themes that adequately reflect the data

(Saldaña, 2015). The first step was to become familiar with the data by reading and re-

reading the data to comprehend participant responses more fully. There were several

rounds of coding. First round coding started with *a priori* codes derived from the LTSI

survey results. The *a priori* codes were supervisor support, supervisor opposition, and

performance coaching. I reviewed, highlighted, and sorted the data several times. The

codes and themes were revised and refined during several rounds of analysis. The initial

list of codes changed slightly. During the coding process, I looked for words and phrases

that the participants used to express their thoughts, feelings, and experiences about

transfer of training in the organization. I combined redundant data and collapsed the

information into fewer categories. I continued to analyze and sort the data into sub

categories until all identified themes emerged. The data supported four themes:

supervisor support, training design, opportunity to use skills on the job, and performance

coaching and mentoring.

Integration of Data

I used a sequential explanatory design to examine if supervisor support or supervisor opposition had an effect on transfer of learning at the nonprofit organization in this study. A sequential explanatory design is characterized by the collection and analysis of quantitative data followed by the collection and analysis of the qualitative data as shown in Figure 3. This study followed this two-phased approach. In the first phase, LTSI survey data were collected and analyzed; in the second phase, in-depth interview data were collected and analyzed. The LTSI questions were closed-ended questions, and the response categories were based on the four categories measured by the LTSI and one added category of learning transfer. The in-depth interviews consisted of questions designed to explore ambiguous survey responses and follow up on significant results from the LTSI. The data analysis results from the two methods were integrated during the interpretation phase of this study after both sets of data had been analyzed separately.

Data Analysis Results

A mixed method sequential explanatory approach was used for this study. Quantitative data were collected first followed by qualitative data. Therefore, I will present the findings from the quantitative phase first followed by the results of the qualitative phase.

Quantitative Data Analysis Results

The following section presents the statistical analysis and findings in relation to RQ1: What is the relationship between supervisor attitudes towards training and the

trainee's perception of transfer related factors? Table 3 shows the demographic data for the LTSI participants. The gender of the sample was 28.3% female and 71.7% male. The respondents held a variety of positions ranging from assistant supervisor to director, the two participants in the other category recently moved from supervisory to non-supervisory roles. However, at the time of attending the training they were in active supervisory positions.

The largest percentage of respondents, 75%, participated in the training because it was job-related. All three locations selected to participate in the survey were represented. Ages ranged from less than 26 years to greater than 66 years old. The largest number of respondents was in the 36 – 45-year-old category and accounted for 33.3%.   All demographic characteristics for gender, age, position, and location were represented in the survey. These data indicated that all demographic categories for the three business units identified to participate in the study were represented.

Table 3

Demographics of LTSI Participants

Demographic	N	Percent
Gender		
Female	17	28.3
Male	43	71.7
Position		
Supervisor	20	33.3
Manager	23	38.3
Director	15	25.0
Other	2	3.3
Reasons for attending		
Personal growth	8	13.3
Job related	45	75.0
Required/other	7	14.7
Location		
District 1	36	60.0
District 2	16	26.7
Corporate	8	13.3
Age		
< 26	2	3.3
26-35	12	20.0
36-45	20	33.3
46-55	14	23.3
56-65	10	16.7
66 or older	2	3.3

Table 4 shows the descriptive statistics for the LTSI. The 48 items on the LTSI

measured 16 different factors that influence the transfer of learning in organizations.

These 16 factors were categorized into four major categories: trainee characteristics,

motivation, work environment, and ability, see Appendix G for definitions of each factor

and which factor was associated with each category. This study specifically examined

the factors of supervisor support and supervisor sanctions. Supervisor support measures

"the extent to which supervisors or managers support and reinforce the use of training on

the job." Supervisor sanctions measures the "extent to which individuals perceive

negative responses from supervisors or managers when applying skills learned in

training" (Dermol & Cater, 2013; Holton et al., 2007, p. 398). The learner's learning

transfer was assessed through the analysis of the additional 14 factors measured by the

LTSI.

The scale scores for personal capacity, supervisor sanctions, and resistance to

change were reverse coded to provide consistency when comparing the scale scores, and

to be able to see the highest and lowest mean scale scores; the higher the mean score, the

more favorable the transfer system. Reverse coding takes items that are negatively

worded so that a high value indicates the same type of response on every item. For

example, there are 20 items each on a 1 to 5 scale. For most of the items, a 5 indicates a

positive attitude, but for a few items, a 1 indicates a positive attitude. Reverse coding

allowed me to measure the total mean scores for the participants and measure responses

with a mean greater than 3. A low standard deviation shows that the data points are near

the average, whereas high standard deviation indicates that much variation exists from

the average (Creswell, 2009). The highest mean scale score was supervisor opposition (M

$= 4.31$, $SD =.58$) followed by transfer effort perceived ($M = 3.97$, $SD =.61$). The lowest

scale score was performance outcome negative ($M = 2.05$, $SD =.76$) followed by

performance coaching ($M = 2.52$, $SD =.81$).

The Cronbach alpha demonstrated acceptable estimates of reliability for these data.

Cronbach alphas ranged from .69 to .89. This range was consistent with previous studies

used to validate the LTSI. Previous studies reported a range .68 to .95. The descriptive

statistics provided me with the mean scores across all 16 factors. They also confirmed the

reliability of each scale.

Table 4

Descriptive Statistics

	N	Alpha	Mean	Std. Deviation	Variance
**SupOppositionR	60	.77	4.3167	.58681	.344
TransferEffortPer	60	.74	3.9667	.61586	.379
OppToUse	60	.80	3.9222	.66770	.446
TransferDesign	60	.88	3.9056	.77894	.607
**PerCapR	60	.79	3.8611	.67868	.461
MotToTransfer	60	.86	3.8056	.81255	.660
**ResistChgR	60	.80	3.7944	.81208	.659
PerfSelfEfficacy	60	.75	3.7667	.62376	.389
LearnerReadiness	60	.77	3.3722	.72898	.531
PeerSupport	60	.79	3.2889	.79183	.627
ContentVal	60	.85	3.2722	.79189	.627
PerfOutcomeExp	60	.69	3.2611	.68915	.475
SupSupport	60	.86	2.9944	.89672	.804
PerOutcomePOS	60	.85	2.8111	.89225	.796
PerfCoaching	60	.89	2.5167	.80588	.649
PerOutcomeNEG	60	.88	2.0500	.76856	.591
Transfer of Learning	60	.82	3.3996	.45643	.208
Valid N (listwise)	60				

Notes. ** Categories reverse coded, reverse coding takes items that are negatively

worded so that a high value indicates the same type of response on every item.

I conducted a correlation analysis (see Table 5) to assess the relationships

between supervisor support, supervisor opposition, and the following four categories of

motivation, trainee characteristics, work environment, and trainee ability. In general, the

higher the correlation coefficient is, the stronger the relationship is. Supervisor support

was significantly correlated with the four variables measured (motivation, trainee characteristics, work environment, environment only).

Supervisor support and motivation ($r = .54$, $p = .000$ (2-sided)) indicated a moderate relationship. A moderate relationship was also found between supervisor support and trainee characteristics ($r = .33$, $p = .000$ (2-sided)). A strong relationship was found between supervisor support and work environment ($r = .72$, $p = .000$ (2-sided)). Environment only contains the factors that make up the work environment scale minus supervisor support and supervisor opposition, $r = .50$, $p = .000$ (2-sided) indicating a moderate relationship. A moderate relationship was found between supervisor support and ability ($r = .49$, $p = .000$ (2-sided)).

Supervisor opposition was significantly correlated with the work environment and ability. A weak negative relationship was found between supervisor opposition and work environment ($r = -.29$, $p = .023$ (2-sided)). A moderate relationship was found between with supervisor opposition and ability ($r = .45$, $p = .000$ (2-sided)).

Supervisor opposition was not significantly correlated with the three variables measured (motivation, trainee characteristics, environment only). Supervisor opposition was not significantly correlated with motivation ($r = .23$, $p = .08$ (2-sided)). Supervisor opposition was not significantly correlated with trainee characteristics ($r = .25$ $p = .05$ (2-sided)). Supervisor opposition was not significantly correlated with environment only ($r = .61$, $p = .64$ (2-sided)).

Table 5

Correlation Analysis and Predictor Measures

	1	2	3	4	5	6	7
Motivation	1	.610**	.740**	.695**	.704**	.226	.535**
Trainee Characteristics	.610**	1	.492**	.448**	.517**	.251	.329*
Work Environment	.740**	.492**	1	.944**	.637**	.293*	.717**
Environment Only	.695**	.448**	.944**	1	.530**	.061	.502**
Ability	.704**	.517**	.637**	.530**	1	.446**	.489**
Supervisor Opposition	.226	.251	.293*	.061	.446**	1	.229
Supervisor Support	.535**	.329*	.717**	.502**	.489**	.229	1

Notes. *$p <$.05. ** $p <$.01

The correlation matrix shown in Table 6 is given for all possible work environment variables and the two predictor measures of supervisor support and supervisor opposition. The relationships were statistically significant between supervisor support and the three variables measured (PerfCoaching, Peer Support, PerOutcomePos). A moderate relationship was found between supervisor support and PerfCoaching ($r =$.36, $p =$.005 (2-sided)). A moderate relationship was found between supervisor support and Peer Support ($r =$.46, $p =$.000 (2-sided)). A moderate relationship was found between supervisor support and PerOutcomePos ($r =$.46, $p =$.000 (2-sided)).

Supervisor support was not significantly correlated with the two variables measured (i.e., PerOutcomeNeg, ResistChgR). Supervisor support was not significantly correlated with PerOutcomeNeg ($r =$.052, $p =$.691 (2-sided)). Supervisor support was not significantly correlated with ResistChgR ($r =$.223, $p =$.086 (2-sided)).

Supervisor opposition was significantly correlated with PerOutcomeNEG. A moderate negative relationship was found between supervisor opposition and PerOutcomeNEG ($r = $ -.30, $p =$.019). Supervisor opposition was not significantly

correlated with the two variables measured (PerfCoaching, PeerSupport,

PerOutcomesPOS, and ResistChgR). Supervisor opposition was not significantly

correlated with PerfCoaching ($r =.02, p =.872$).

Supervisor opposition was not significantly correlated with Peer Support ($r =.18,$

$p =.167$). Supervisor opposition was not significantly correlated with PerOutcomesPOS

($r =.14, p =.281$). Supervisor opposition was not significantly correlated with ResistChgR

($r =.17, p =.193$).

Table 6

Work Environment Correlation

	1	2	3	4	5	6	7
PerfCoaching	1	.181	.259[*]	.204	-.042	-.021	.358[**]
PeerSupport	.181	1	.483[**]	.718[**]	.234	.181	.466[**]
PerOutcomeNEG	.259[*]	.483[**]	1	.420[**]	-.197	-.303[*]	.052
PerOutcomesPOS	.204	.718[**]	.420[**]	1	.187	.141	.462[**]
ResistChgR	-.042	.234	-.197	.187	1	.171	.223
Supervisor Opposition	-.021	.181	-.303[*]	.141	.171	1	.229
Supervisor Support	.358[**]	.466[**]	.052	.462[**]	.223	.229	1

Notes. *$P <.05$

The skewness and kurtosis for normal variables should be within the values range

of minus two through plus two. The skewness and kurtosis for the independent variables

and the dependent variables (Supervisor Support, Transfer of Learning, and Supervisor

Opposition) are within the values range of minus two through plus two. Thus, the

independent variables and the dependent variable are normally distributed.

I conducted additional analysis to evaluate RQ1. First, a correlational analysis

was performed to evaluate the research question. A moderate relationship was found

between transfer of learning and supervisor support ($r =.58, p =.00$). Participants who

received support from supervisors were likely to indicate that transfer of learning had

taken place.

Table 7

Correlation Analysis

	Transfer of learning	Supervisor support	Supervisor opposition
Transfer of Learning	1	.575**	.287*
Supervisor Support	.575**	1	.229
Supervisor Opposition	.287*	.229	1

Notes. *P <.05. * p <.01

A multiple regression analysis was conducted to test the research question further. Table

8 shows the multiple regression analysis. Multiple regression analysis is most

appropriate for predicting the impact of two independent variables on one dependent

variable. The objective was to determine a relationship, if any, between supervisor

attitudes towards training and the trainee's perception of transfer of training related

factors. There is an estimate for three parameters, intercept, supervisor support, and

supervisor opposition. Supervisor support has a significant impact on transfer of learning

(B =.27, p =.000). Participants who received support from supervisors were likely to

indicate that transfer of learning had taken place. R-square is .36. Adjusted R-square is

.33.

Table 8

Regression Analysis

Model		Unstandardized Coefficients B	Std. Error	Standardized Coefficients Beta	t	Sig.
1	Intercept	2.030	.369		5.496	.000
	Supervisor Support	.274	.056	.538	4.928	.000
	Supervisor Opposition	.127	.085	.164	1.501	.139

Notes. *p <.05. Dependent variable: Transfer of learning.

A strong relationship was found between supervisor support and work environment. Supervisor opposition was significantly correlated with the work environment and ability. The quantitative findings suggested that supervisor support has a significant impact on transfer of learning. Participants who received support from supervisors were more likely to indicate that transfer of learning had taken place. The mixed-method design of this study allowed me to further explore the perceptions of transfer of training in the organization in the qualitative interview phase of the study.

Qualitative Data Analysis Results

The following section presents the analysis and findings in relation to RQ2: What is the relationship between supervisor attitudes towards training and the trainee's perception of transfer related factors? Data analysis was not limited to *a priori* codes. After reviewing the transcribed information and conducting several rounds of coding, other themes emerged and were utilized to identify the final themes. After completing the data analysis four themes emerged. These were supervisor support, training design,

opportunity to use skills on the job, and performance coaching and mentoring.   Tables 9

shows the *a priori* codes, categories, and themes.

Table 9

Supervisor Support: Analysis of Data, Categories, and Themes

A priori codes	Subcodes	Other emergent sub-codes	Categories	Themes
Supervisor Opposition	Lack of opportunity Lack of manager support Opportunity to use		Supervisor Opposition	Supervisor Support
Supervisor Support	Holding people accountable Individual Development Plan Supervisor	Resources	Supervisor Support	Supervisor Support
Performance coaching	Lack of time to coach Coaching Counseling Feedback/ follow-up		Coaching	Coaching/ Feedback
N/A		Activities Role Plays Hands on Case Studies Relevant	Perceived Content Validity	Training Design
		Lack of opportunity Opportunity to use	Opportunity	Opportunity

Theme 1: Supervisor support. The first theme was participants' comments

concerning how supervisor support influences the use of skills back on the job.

Supervisor support, as defined in the LTSI scale definitions (Appendix G), is the extent to

which manager's support and reinforce the use of learning on-the-job and includes setting

goals providing feedback, and working with individuals when problems occur. Sixty-three percent of the participants mentioned supervisor support. This theme was evident as participants discussed how their supervisors and managers could support them and reinforce training back on the job. One participant stated, "…after attending a class I asked my supervisor for feedback, they said we would have to go to lunch and talk, and it never got followed up on." Another participant stated "My supervisor is always promoting, what you have learned you are free to use. Some supervisors, however, are unaware of the tools and techniques …and there is no reference to what you have learned."

Incorporating individual development plans (IDPs) into the leadership development process was specifically mentioned several times. Precisely participants suggested setting goals and including training as part of the organizations IDP process. One participant stated, "I think maybe in an IDP format identifying what would be expected of participants to keep it (training) alive." Another participant agreed and said, "It has to be instilled that it is part of their development." A third participant stated, "I think there's a piece here where your supervisor needs to clearly articulate what your development needs are."

One participant said, "My leadership, my supervisor do they have expectations with that tangible skill. If they aren't aligned, they don't support that skill." Supervisor support has a significant impact on transfer of learning. Participants who received support from supervisors were more likely to indicate the transfer of learning had taken place. Sixty-three percent of the participants stated that heavy workload impacted their

ability to use the skills taught in the classroom. One participant said, "What I tend to see mostly when they are out in the field it's hard for them to apply some of the training because they are working themselves, so it's hard." Another participant said, "…sometimes it's hard to work with others on their skills when you are overwhelmed with your own job." A third participant agreed that workload was a factor, she stated, "For me to even catch my supervisor it's difficult, I set up appointments, and they get pushed to the side because of the workload." The workload of the participants needs to support the transfer process adequately.

Theme 2: Training design. The second theme of training design and how it applies to the transfer of training became evident across the findings. A majority of participants (88%) stated that if the activities and exercises were not relevant, it would not contribute to TOL. One of the participants stated, "Is it relevant to the job that I presently do? Do I want to do it that way do I want to change the way I do things." Another participant stated, "Really showing how this can apply to my current position now and how. The last class …, 75% were in one department, and I am in another department, many examples were about the other department and did not apply to me." Seven participants (88%) mentioned activities and real time scenarios as contributing to learning and transfer of training back to the workplace.

One of the participants thought the leadership skills taught in training were very superficial. She thought that more case studies, for example how to save money, would be more valuable. She said, "Have the instructors provide specific scenarios, and give feedback that's peer driven. People learn when they make mistakes … They will not

learn without real life situations." Another participant said, "Definitely hands-on case studies, and not basic chain studies… A case study requires information; it requires a deductive thought process." Participants indicated that the activities and real time scenarios built into a training session would help them to be able to apply better the skills learned back on the job. The frequency which training design was mentioned by the participants was significant enough for training design to be considered an individual thematic category.

 Theme 3: Opportunity to use skills on the job. The third theme is tied directly to having the opportunity to use the skills when they get back to the workplace. The opportunity to use the skills is the extent that trainees are provided with the resources to enable them to use the skills taught in the training program. Fifty percent of the participants indicated this was an important factor in transferring skills and knowledge from the classroom back to the workplace. One participant stated, "If I get the opportunity to get involved and use the skills…" Another participant said, "Depending on what the skill is, the frequency of applying it, how often do you need to use it? When do you have the opportunity to use it?" A third participant agreed opportunity to use the skills was important. She stated, "If' I am going out on mobiles because we are short staffed it does not give me the opportunity to have the time to use it." One participant recommended creating project teams after the training, she stated:

 You have to give people the opportunity to apply and use it in a real

 situation. You put that person on a project team for several projects in the

center where they are actually dealing with what I would call a mini theme …they have to apply what they learn.

Another participant stated "They (my supervisor) give me the opportunity to use the skills…did not micromanage." It is easier to develop skills when participants have an opportunity to practice.

Theme 4: Performance coaching and mentoring. The final theme that emerged was performance coaching and mentoring. Performance coaching is the extent to which individuals receive coaching and constructive feedback and input from people in the work environment (Appendix G). One person said it would be nice if her supervisor could review what they learned and develop a plan to help her use what she learned. She said, "For example, how can we improve morale with what you learned in class? Sit down together, review, this is what was taught, maybe do role plays and try and implement. Practice. A plan, help, practice…." Another participant stated, "Once you do talk about it put a plan in place, talk to someone, practice, then complete the circle and give feedback on the practice." A third participant stated, "True follow up, mentoring, and coaching… helps support." Support activities that enhance transfer of training include performance coaching (Lunsford, 2011). Among the suggested options aligned with current best practices was having a mentor assigned to participants. One participant stated "Very good class got a lot out of it but once you get back to work you truly need a mentor in your area… You need somebody to bounce ideas off, to talk to…." Receiving feedback was mentioned by 38% of the participants and was mentioned nine times during the interviews. One participant stated, "feedback that's peer driven, people learn when

they make mistakes." Another participant stated "Again with communication, if I convey some of the more savvy points that are relative to what we are going through at that time and gain his or her (supervisor) feedback." A third participant stated, "My supervisor can give me some true honest feedback, not to cut me down but to guide me." Participants reported receiving timely, constructive, and honest feedback, just-in-time coaching, and having a mentor are strategies that could enhance transfer of learning in the organization.

Summary

An mixed-methods sequential explanatory approach allowed me to collect quantitative and qualitative data to understand better and explain the transfer of training. The quantitative portion of the study answered the first question regarding the relationship between supervisors' attitudes towards training and trainees' perceptions on transfer related factors. The responses to the LTSI questions indicated that supervisor support and performance coaching have a significant impact on transfer of training. Additionally, supervisor support affects trainees' perception of other work environment factors including performance coaching and personal outcomes – positive.

I conducted telephone interviews to collect the qualitative. Each transcript was read several times, then coded and examined for themes. The seven qualitative interview questions (see Appendix H) enhanced the results of the LTSI survey and answered the second research question regarding practices and recommendations to improve transfer of training. Interview Questions 1 through 5 provided insights into the information, practices, and recommendations that supervisors should provide to enhance transfer of

learning. Four primary themes emerged from the analysis: (a) supervisor support, (b) training design (c) opportunity to use and (d) performance coaching and mentoring.

Conclusion

The primary goal of this project study was to examine the relationship between supervisor support or supervisor opposition that hinder the transfer of learning. The correlation between Transfer of Learning and Supervisor Support is positive ($r = .58$, $p = .000$). Supervisor support has a significant impact on transfer of learning ($B = .27$, $p = .000$). Participants who received support from supervisors were likely to indicate that transfer of learning had taken place.

RQ2 addressed: what can be done to enhance transfer of learning at the organization for supervisors who attend leadership development training? Interview questions 1-5 were designed to answer RQ2. Four themes stemmed from these findings: (a) supervisor support, (b) training design (c) opportunity to use and (d) performance coaching and mentoring

As a result of these themes, the best option for a project is the creation of policy recommendations designed to encourage leadership involvement, ensure training design is relevant to participants, provide opportunities for participants to use the skills taught in training back in the workplace and address performance coaching.

Section 3: The Project

Introduction

This project study was designed to investigate the transfer of training for

participants attending leadership development programs in the organization. The LTSI

survey and interview questions were used to gather information intended to identify

barriers to the transfer of training. The findings of this study were used to guide the

project development. The project for this research was a policy position paper. With this

position paper, I intend to inform the stakeholders of policy recommendations to enhance

transfer of training. This section provides a description of the goals and rationale of the

project, a relevant literature review, resources needed for implementing the project,

potential barriers to implementing the recommendations, the project implementation plan,

a project evaluation, and implications for social change.

Rationale

I wrote a position paper to provide recommendations on the strategies and best

practices that can enhance the transfer of training for the participants who attend training

in the organization. I chose to develop a position paper for this project study based on the

participants' qualitative and quantitative responses. In the findings of the study, I found

that, overall, participants had positive reactions to the training and to gaining new skills.

However, when the participants returned to the workplace, they faced barriers in

transferring the skills due to minimal supervisor support, minimal opportunity to use, and

a lack of coaching or mentoring opportunities. The correlation between transfer of

learning and supervisor support was positive ($r = .58$, $p = .000$). Supervisor support had a

significant impact on transfer of learning ($B =.27$, $p =.000$). Participants who received

support from their supervisors were likely to indicate that transfer of learning had taken

place. Supervisor support played a role in the participants having the opportunity to use

the performance coaching as well. Although training design was not classified as a work

environment factor on the LTSI scales (Appendix G), 88% of the participants mentioned

it as a barrier to their ability to transfer training back to the job. The results were

significant enough to identify training design as a part of this position paper.

The project for this research was a policy position paper in which I outlined

recommendations on supporting the transfer of training based on the research findings.

The participants reported that supervisor support (100%), training design (88%),

opportunity to practice and use the skills (50%), and performance coaching (38%) would

enhance their transfer of learning. Additionally, in the results from the LTSI (Table 4), I

found that supervisor support and performance coaching were significantly correlated

with the transfer of learning. All recommendations suggested by the participants were

consistent with research and best practices on the influence of work environment factors

in supporting the transfer of training (Sitzmann & Weinhardt, 2015). Effective

organizational policies and processes can be used to support participants' efforts to

transfer learning back to the workplace (Clarke, 2013; Dermol & Cater, 2013; Futris et

al., 2015; McLaughlin, West, & Anderson, 2016). A combination of strategies and best

practices can enhance transfer of training.

A recommendation within a position paper can be used to create a more consistent

and unified approach to training transfer that is unique to the organization and its

workforce. Participants in the study provided ideas for creating transfer of training in the organization. In this position paper, I incorporated the recommendations of the participants and aligned them with best practices for effective transfer of training. For the transfer of training to be maximized in the organization, participants need to not only attend training, but also to have support during and after the training. Improving the transfer of training involves effective classroom practices, follow-up, support from leadership, and an opportunity to practice the skills taught in the classroom back on the job.

By integrating a policy that is intermixed with best practices in transfer of training, the participants will have an opportunity to increase their transfer of training and align the transfer of training with the organization's goals and objectives. Policy can lay the foundation for creating organizational accountability for improving transfer of training. A position paper is best suited for this project because position papers are used to describe an issue and use evidence to support the recommendations (Bardach, 2016; Honig, 2006; Xavier University Library, 2013). Organizations can create a policy and to take action to achieve desired outcomes. The findings from this study were used to create each of the recommendations in the position paper

Review of the Literature

In the review of literature, I focused on position papers, policy statements, and identifying strategies and best practices to enhance transfer of training. The following databases were searched for this literature review: ProQuest, EBSCO, Google Scholar, ERIC, Sage, and Education Research Complete. Search terms included the following:

position papers, *white papers*, *policy*, *transfer of training*, *transfer of learning*, *transfer of training best practices*, *coaching*, *performance coaching*, *mentoring*, *supervisor support*, *individual development plans*, *opportunity to use training*, *leadership development*, *training design*, and *professional development*. I focused my research on the most recent and relevant studies on transfer of training within the past 5 years. Transfer of training strategies can improve the transfer of learning in organizations. The information I found from the literature search was used to support the development of this project.

The design of this project was primarily based on Holton's (1996) model and the LTSI. Holton proposed three outcomes of a training intervention: learning, individual performance, and organizational results. Holton took a holistic view of transfer of learning and emphasized a transfer system (Holton et al., 2000; Holton et al., 2007). I decided to use the LTSI based on its comprehensiveness, verified construct validity, and evidence of predictive validity (Bates et al., 2012; Kim & Callahan, 2013; Peters et al., 2014). The LTSI includes the categories of supervisor support, training design, opportunity to use, and performance coaching. These categories directly correlate to the themes identified in the qualitative portion of the study.

Support for Using a Position Paper

A position paper is an effective way to incorporate several recommendations for transfer of training based on the feedback from the study participants. The terms position paper and white paper are often used interchangeably (Purdue University, 2013). Both names are associated with papers that support an opinion or position on a topic. Position papers are used in the government, marketing firms, corporations, and academia

(Graham, 2013a; Graham, 2013b; Study Guides and Strategies, 2013; White Paper, 2013). Researchers use position papers to present findings and to make recommendations (Lodico et al., 2010). Position papers are also used to make policy recommendations (Bardach, 2016; McLaughlin et al., 2016; Smith, 2013; Smith & Katikireddi, 2013). Position papers have become tools for researchers and businesses to communicate ideas, state opinions, and to make recommendations (Bardach, 2016; Graham, 2013a; McLaughlin et al., 2016; Smith & Katikireddi, 2013). The term policy position paper is becoming more prevalent in both academic and nonacademic writing.

Policy position papers are designed to communicate ideas or opinions about an issue, influence decisions, and state a position about a particular policy (The Business Advocacy Fund, n.d.). Rubin and Rubin (2005) contended that presenting research results in a policy paper should help the reader understand the issue and guide his or her decision making. Policy papers are shorter and can be condensed from a larger research report. Starting in the early 1990s, businesses have used position papers to influence buyers to purchase their products (Graham, 2013b). These finding help to support the purpose of this position paper, which was to influence decisions on transfer of training strategies to improve work performance in the organization.

Position papers are designed to persuade and influence the reader based on data and facts. Bardach (2016) supported policy analysis and position papers as a way to establish a system to take action. Bardach stated, "Policy analysis goes beyond personal decision making" (p. xv). Based on the research and the problem identified, actions are defined, projected outcomes are suggested, and recommendations are made to address the

action items (Bardach, 2016). Policy implementation can be complex, and the results may vary based on the people involved, the situation, and location of the policy to be implemented. However, education can be improved through policy implementation (Honig, 2006). Practice and reinforcement of a policy play a role in the practice of policy and its success, and policy makers need to understand practice when creating policy or the policy could backfire and create unwanted consequences (Au & Ferrare, 2015; Cohen, Moffitt, & Goldin, 2007; McLaughlin et al., 2016; Troia & Olinghouse, 2013). Policy can be used to shape practice, or practice can be used to shape policy (Au & Ferrare, 2015; Troia & Olinghouse, 2013). The policy position paper for this project was based on the research that I conducted and a review of the literature on training transfer in relationship to supervisor support, training design, opportunity, performance coaching, and best practices. In the project, I offer recommendations to supervisors and leaders within the organization that are intended to improve the transfer of training.

Supervisor Support of Training Transfer

Training transfer is influenced by many factors including the work environment and supervisor support (Bossche & Segers, 2013; Sitzmann & Weinhardt, 2015; Yasin et al., 2013). Supervisor support is defined as the extent to which managers support and reinforce the use of learning on-the-job (Appendix G). Supervisor support is related to transfer of training (Hussain, 2011; Lee et al., 2014; Pham et al., 2013). Blume et al. (2010) found that supervisor support has a relationship with transfer of training. Trainees place a higher value on training when leaders demonstrate support for training and indicate that training is a high priority (Ghosh, Chauhan, & Rai, 2015; Towler, Watson,

& Surface, 2014). Practical help during the course impacts the values that supervisors

place on the course, and follow-up after the course provides an opportunity to reinforce

and support transfer of training (Lancaster et al., 2013). Almannie (2015) found that

"65% of respondents indicated that transfer of knowledge and skills were limited in the

workplace because of a lack of encouragement to apply what they learned" (p. 10).

Some researchers have indicated that supervisor support is not significantly

related to transfer of training (Madagamage, Warnakulasooriya, & Wickramasuriya,

2014; Manju & Suresh, 2011; Maung & Chemsripong, 2014). Bhatti, Battour, Sundram,

and Othman (2013) concluded that previous researchers have not been able to get

consistent results about the roles of supervisor in training transfer. There are time

constraints and work constraints that impact transfer of training. Unless supervisor

support is recognized as a business expense with a return on investment, a lack of support

will continue to negatively affect transfer of training (Ellinger, 2013). Another factor that

can enhance support for the transfer of training process is creating an IDP for participants

attending professional development programs.

An IDP is a tool that many organizations use to plan for career development.

According to Coloma, Gibson, and Packard (2012), using IDPs as a core component in

leadership development enhanced transfer of training. Additionally, Coloma et al. found

that participants indicated high satisfaction with having an IDP. Satisfaction was highest

in using a simplified format of an IDP (Coloma et al., 2012). Integrating an IDP or an

action plan into the training process can strengthen transfer of training (Hoffmann &

Freeman, 2014). An IDP is a development plan that is jointly developed by the employee

and the supervisor. An IDP identifies goals, training, coaching opportunities, and other

activities needed to help achieve the goals set. Transfer of training in the workplace can

be enhanced by having active IDP process in an organization. Policies that increase adult

learning practices require on-going commitment from leaders (Schechter & Qadach,

2012). Zenger (2013) stated that "fewer than 10 percent of leaders will have any personal

development plan without the encouragement of some formal process" (p. 11). Tailoring

IDPs based on the individual's career goals creates greater accountability for the learner

(Friese, 2013). Additionally, creating IDPs can provide an opportunity for the supervisor

to demonstrate support in helping the employee achieve the goals established.

Assimilating the concept of transfer of learning into an organization requires leaders to

engage in the learning and transfer process and provide follow-up activities that support

the transfer of training process. In Handout #1 in Appendix A, I identify additional tips

that can be used to support supervisors in their role in transferring training back to the

job.

Training Design

Training design plays a role in transfer of training. Although training design was

not the primary topic for this research study, 88% of the participants identified training

design as a barrier to transfer of training; therefore, it was deemed significant enough to

the study to be added for consideration to the policy recommendations. Peterson, in an

unpublished paper, indicated that "25 per cent of learning effectiveness came from the

learning event, 25 per cent from the preparation of the learning event and 50 per cent

from follow-up activities" (as cited in Drake, 2014, p. 50). The majority of training

budgets are spent on the training events themselves rather than on follow-up activities that can reinforce training (Drake, 2014; Khan, Mufti, & Nazir, 2014). The American Society for Training and Development (2006) attributed as much as 70% of training failure to a lack of follow-up support after the training event. A lack of follow-up activities impact transfer of learning (Coloma et al., 2012; Drake, 2014; Ghosh et al., 2015). Follow-up activities can be built into the training design. Follow-up activities can include providing the opportunity to use the training and coaching.

No one design component is effective in all training programs. However, training design does have an impact on transfer of training (Bates et al., 2012; Blume et al., 2010; Nesbit, 2012; Saks & Burke, 2012). Training designers need to be aware of the relevancy of the content, know the organizational goals to be achieved as a result of the training, use adequate exercises and activities to engage learners' interest, provide opportunities to practice and receive feedback in the classroom, and understand trainee characteristics and learning styles (Lee et al., 2014; Locht et al., 2013). In the training design, the trainers need to ensure that learning creates the business value it was intended to achieve and enhances the organization's human capital (Wick et al., 2015). Other follow-up activities that can be built into the training design are collaboration, peer group meetings, and follow-up assessments.

Follow-up activities after training has occurred can lay a foundation in supporting transfer of training. Collaboration and small groups or peer teaching benefit from transfer of training (Kirschner, Paas, Kirschner, & Janssen, 2011; Sears & Pai, 2012). Active training is based on the premise that participants are involved in the learning

process rather than being passive; active training methods positively influence training transfer (Noe et al., 2010). I found several factors that influence transfer of training in the training design and work environment. Through simulations, case studies, collaborating with peers, and coaching, participants can integrate theory and practice. Participants will also be better prepared to apply new skills immediately back on the job. In the position paper, I identify multiple training methods and strategies to enhance transfer of training. In Handout #2 in the Appendix, I define additional tips to support training design as it relates to transfer of training back to the workplace.

Opportunity to Use the Skills on the Job

There are several common methods for creating opportunities to use skills taught in the classroom back in the workplace. Having the opportunity to practice the skills, receiving feedback on their performance, and having the opportunity to make adjustments as needed to improve performance are opportunities to increase transfer of training in an organization (Drake, 2014; Martin, 2010). Supervisors can support their employees by removing obstacles that inhibit transfer of training (Futris et al., 2015; Lancaster et al., 2013; Martin, 2010). Ballesteros and De Saá (2012) identified breadth, activity level, and task type as dimensions that impact opportunity to use

> Breadth is the number of activities addressed in training that is utilized in
> the job; activity level refers to the frequency with which tasks contained
> in training are performed; and the task type denotes the degree of
> difficulty of those activities or tasks. (p. 1268)

Ballesteros and De Saá showed that having the resources and opportunity to use the skills taught are essential to successful transfer of training, and supervisors play a role in providing opportunities for trainees to practice or use skills taught in the classroom back in the workplace. Supervisors can provide reinforcement, on-the-job work experiences, and project assignments. Several scholars (Clarke, 2013; McCracken et al., 2012; Pollock & Jefferson, 2012) also claimed that the opportunity to practice and use skills taught in the classroom are essential to transfer of training. On-the-job coaching and training, providing tasks that progress and become increasingly more difficult, and increasing the frequency that the employee gets the chance to use the skills reinforces learning in a manner that helps build skills. The opportunity to use or practice skills is important to transfer of training. Likewise, performance coaching plays a critical part as well in transfer of training.

Performance Coaching and Mentoring

Coaching, also referred to as performance coaching, is the extent to which individuals receive construct feedback and assistance from people in the organization on their performance (Appendix G). This feedback can be from employees, managers, or peers and can be formal or informal. There is growing empirical evidence that performance coaching can support and promote the transfer of learning from professional training to practice (Chiaburu et al., 2014; de Figueiredo et al., 2015; Dermol & Cater, 2013; Hartnett-Edwards, 2011). Park and Jacobs (2011) studied both formal (for example, classroom training) and informal learning (for example, unstructured on-the-job activities, coaching, mentoring) and found that blending both formal and informal

activities increases the effectiveness of transfer of training strategies. Anderson,

Feldman, and Minstrell (2014) found a strong correlation between the amount of time a

teacher and coach spend together and the improvements in helping teachers transfer the

skills learned in professional development courses.

The more time spent with a coach, the better the teacher performance was.

Varney (2014) found in one U.S. study "training alone improved productivity by 22

percent but when performance coaching was added, productivity increased by a huge 88

percent" (p. 27). Goal attainment is also improved with coaching (Bright & Crockett,

2012; Grant & Hartley, 2014). Coaching is highly appropriate and helps reinforce

learning and transfer of training (Lenartowicz, Johnson, & Konopaske, 2014; Theeboom,

Beersma, & van Vianen, 2014).   Often, coaching is only provided to high potential

employees. However, it has the potential to be cost-effective and benefit a much larger

population in organizations (Bright & Crockett, 2012). According to Bright and Crockett

(2012) coaching improved work productivity, conflict resolution skills, and ability to

receive feedback from others more effectively. Dermol and Cater (2013) suggested a

coaching network to promote learning and provide feedback to support the transfer of

training. Grant and Hartley (2014) found coaching skills were useful in facilitating the

transfer of training. Involving other leaders within the organization can further improve

transfer of training (Hoffmann & Freeman, 2014). Post-training, leaders in the

organization could act as coaches and be involved in follow-up review sessions, or serve

as mentors. Perceived post-training support from leaders may impact transfer of training

for some participants (Coloma et al., 2012; Futris et al., 2015). Schindler and Burkholder

(2014) posited mentoring, coaching, and social support has an influence on the transfer of training. Additionally, coaching skills are core competencies for today's leaders (Grant & Hartley, 2014). To be an effective leader is to be an effective coach (Goleman, Welch, & Welch, 2012). Based on the current research, the findings support the use of performance coaching as an effective way to enhance the transfer of training in organizations. Several types of coaching can be used to improve the transfer of training in the organization: performance coaching, peer coaching, and mentoring. Each of these strategies requires collaboration and desire between leaders of the organization to improve the transfer of training. These strategies are discussed more in Appendix A. In Handout #3 in Appendix A, I identified additional tips in a one-page handout that can be used to support performance coaching.

Project Description

The purpose of the project study is to inform the vice president of human resources of the results of the study and to provide suggestions for enhancing transfer of training in the organization. Based on the findings, policy recommendations were developed in the position paper "Creating a Transfer of Training Work Environment through Supervisor Support, Training Design, Opportunity and Coaching" (Appendix A) to enhance transfer of training in the organization. From a transfer of training perspective, it is clear that organizations are still missing some fundamental steps to ensure transfer occurs. A lack of consistent practices becomes an obstacle to transfer of training (Ford, 2014). The policy proposal's short-term goal is to inform decision makers of best practices to minimizing barriers to transfer of training, based on the four themes

of (a) supervisor support, (b) training design (c) opportunity to use and (d) performance coaching and mentoring that emerged from the study. The long-term goal is to create a successful learning transfer climate within the organization. At the time of the study, the organization had a coaching and mentoring policy that was not widely used to reinforce transfer of training. I propose that supervisor support, training design, opportunities to apply the training, and performance coaching become more closely aligned with business and organizational strategies in a way that demonstrates the importance of transferring skills back to the workplace. Corporate leaders play a critical role in supporting transfer of training and thereby helping employees grow and develop.

It is important that the recommended strategies are communicated throughout the organization. Transfer of training research consistently shows that work environment can influence behavior on the job (Luse, 2013). This project is designed to present recommendations to increase the transfer of training for leadership development programs in the organization from pre-training and supervisor support strategies, through the formal process of the on-the-job experience as well as coaching and mentoring which ensures a holistic approach to the transfer of training for the organization. To realize the implementation of the recommended strategies, after completion of my project study I will deliver the findings to the vice president of human resources.

Potential Resources and Existing Supports

The vice president of human resources, local human resource managers, directors, and managers within the organization are key potential resources for successful implementation of the strategies recommended for this project. The center directors are

essential in supporting the recommendations at their respective locations. If center

leadership is made aware of the results of the research, they could potentially understand

the needs of the participants who attend leadership training and integrate the

recommended strategies into annual business plans (Ghosh et al., 2015). Another

potential support for this project is the organizational trainers. Corporate trainers are the

primary points of contact for training and organizational development activities within

the organization. Funding will also be needed to purchase and administer leadership

development or coaching assessments if the organization chooses to use assessment tools.

Potential Barriers

Funding may be a potential obstacle. Lack of funding may cause delays in

implementation of some of the recommended strategies such as purchasing assessments

or utilizing external coaches. Another possible barrier is a lack of staff. Currently, there

are only two organizational trainers serving all locations. Also, all district leaders may

not be in support regarding the time needed for staff to act in the role of coaches or

mentors. It will be difficult to convince those leaders to build time into the regular

workday to support these activities unless they perceive that the activities add value.

Leaders will consider the project regarding how it will add value and help them meet

their organizational goals and objectives (Wick et al., 2015). Executing change in any

organization is difficult. It requires leadership support and commitment of resources.

Proposal for Implementation and Timetable

The formal request to present this project to the VP of Human Resources will be

made following the approval of this project study by Walden University. The desire is

that the VP of Human Resources will consider implementing strategies outlined in this

position paper. If desired by the organization, I will coordinate additional presentations

to district directors, local human resources managers, organizational trainers, and support

staff within one month of presenting to the vice president of human resources. This

strategy invites a greater level of participation and communication to key stakeholders.

The recommended strategies for improving transfer of training begin before the

leadership training starts. Identifying and providing training for internal coaches is the

first step in the process. This activity is followed by having the supervisor ensure the

trainee is aware of the training dates and times followed by the supervisor and the trainee

having a discussion on how the course ties into business results. Additional activities

before training include a pre-test, self-assessments, pairing the coach and the trainee, and

having an initial coaching conversation between the coach and the trainee.

During training, the trainer can ensure the trainee has the opportunity to set goals

based on the training. Additionally, have the trainer use interactive teaching methods and

ensure the content is relative and uses real work challenges that the trainee may encounter

when they are back on the job. The follow up after the training session ends is key to

ensuring transfer of learning takes place. The supervisor and the coach are essential to

following up with the trainee on the goals set before and during the training session. The

supervisor should work with the trainee on creating an IDP, and coaching sessions should

be held on a regular basis. An outline of activities suggested for implementation is listed

below:

Before Training:

- Train Organizational Coaches

- Supervisor communicates training date and length of training to the trainee

- Supervisor has pre-training discussion with employee on how training ties into performance and business results

- Trainer administers a pre-test

- Certified assessor administers self-assessment tool (if applicable) and debrief trainee on results

- Supervisor follows up on pre-work assignment(s) to ensure completed

- Designated representative pairs trainee and coach

- Assigned coach holds initial coaching contract meeting

During Training:

- Trainer has trainee set 2 – 3 goals based on training content (have the trainee place in pre-addressed envelope)

- Trainer uses interactive teaching methods

- Trainer uses "real" work challenges in training delivery

After Training:

- Supervisor follows up with trainee on training and goals set during training session

- Supervisor creates an individual development plan (IDP)

- Trainer sends e-mail reminders of training content

- Trainer sends goals set during training to trainee's supervisor

- Coach holds coaching sessions as agreed upon with the trainee

Roles and Responsibilities of Student and Others

The responsibilities for the presentation of my research and position paper, included in Appendix A, remain with me. I will contact the stakeholders to schedule the presentations via WebEx. The key drivers for successful implementation of this project are the human resource representatives and center leadership within the organization. Human resources representatives and the leaders of the organization have sole ownership over this project once they receive the position paper. The VP of Human Resources will use the data to determine the strategy moving forward and to determine what role others in the organization will have in implementing the recommendations. The role of the student is to participate in opportunities that result from application of the project.

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Project Evaluation Plan

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The project evaluation plan is to collect both formative and summative information. The plan is also goal-based. After implementation of recommendations in the organization, all trainees who participate in leadership development courses will be requested to complete the LTSI, a summative evaluation (Appendix F) to assess their perceptions on transfer of training in the organization. The LTSI instrument could be used as the benchmark, an increase in the scores on the categories of supervisor support, performance outcomes positive, performance outcomes negative, and performance coaching would also indicate a positive movement for transfer of training.

In addition, formative evaluation could occur by having a representative in the organization follow up, via focus groups or one-on-one interviews, with a random sample

of trainees who attend leadership development courses. During the focus groups or one-on-one interviews ask the trainees what can be done to enhance transfer of learning after attending leadership development courses at the organization. The evaluation is also goal-based. The justification for a goal-based evaluation is so that everyone knows what the goal is. If the goal is not met adjustments can be made. The goal is to involve supervisors and managers in the transfer of training process and to improve transfer of training in the organization. The key stakeholders are the vice president of human resources, human resource managers, trainees, supervisors, and managers.

Project Implications

Social Change: Local Context

Implications for this study involve discussions on transfer of training in the organization. Implementation of the recommendations in this position paper has the potential to increase the transfer of training from the classroom back to the workplace. Increasing transfer of training can improve relationships in the organization and can positively impact the bottom line profit (Long & Perumal, 2014). Greenbaum (2012) conducted a study on how supervisors impact employee turnover. The results of Greenbaum's study indicated that supervisor's behaviors do influence employee turnover. Transfer of training strategies can ensure managers recognize and reward transfer efforts and provide users of transfer strategies with a sense of accomplishment (Pollock & Jefferson, 2012). The recommendations created as a result of this project study have the potential to improve the transfer of training in the organization. There are implications for the organization as well. Research indicated the transfer of training improves an

organization's profits and creates collaborative learning environments which benefit the participants and the communities where these participants live and work (Khan et al., 2014; Saks & Burke, 2012). The resulting recommendations have implications in a larger context as well for potential social changes.

Social Change: Larger Context

The position paper presented recommendations to the transfer of training practices that can be used to initiate conversations and promote increased transfer of training back to the workforce. The recommendations presented in this position paper can be beneficial for professional development across different industries as well. This study sought to identify potential barriers and identify supporting factors to enhance transfer of learning in one organization. The position paper presents effective practices that may be used as a starting point for any organization to increase the transfer of training. An increased number of trainees will have an opportunity to practice and enhance their work skills, resulting in these individuals improving their professional development. Transfer of training strategies can improve bottom line profit, increase employee retention, and contribute to employee success. Ultimately, transfer of training can result in positive economic and social change across all organizations.

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Conclusion

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Section 3 began with an introduction, description and goals of the project, and a relevant literature review. This project was designed to address the research findings by creating practices to improve the transfer of training in the organization. This project contributes to policy design about supervisor support, training design, the opportunity to

practice, and performance coaching and mentoring. The literature review provides support for the policy proposal by examining research on policy and position papers, supervisor support, training design, opportunity to use, and performance coaching and mentoring relating to transfer of training. By following recommended best practices, the organization will be better positioned to prepare leaders and improve the transfer of training in the organization. The results of this study will help inform stakeholders of the relevant factors impacting transfer of learning and will also provide a framework for further research and potential policy changes in the organization. In Section 4, I outline the strengths and limitations of this project study, along with my reflections and conclusions.

Section 4: Reflections and Conclusions

Project Strengths and Limitations

A key strength of this study was the sequential explanatory design. By using quantitative data, I was able to assess the relationship between supervisor support and supervisor opposition on transfer of training in the organization. The qualitative interviews provided rich descriptive data of the participants' perceptions on transfer of training in the organization. The mixed-method methodology provided a more holistic view of trainee perspectives. In addition, the project provides a mechanism for communicating the results of my research to the organization. The position paper provides a variety of ideas that can be used individually or in combination with one another to enhance transfer of training.

The findings from the project study contribute to a broader understanding of the transfer of training. Few mixed-methods studies have been conducted on the transfer of training and even fewer studies in nonprofit organizations. Also, the research findings provide stakeholders from both nonprofit and for-profit organizations with a strategic approach to improving the transfer of training in their organizations. The strength of delivering the research project's findings through the position paper is its ability to present information to the intended audience. Although the findings of this study may not be generalizable in a broad sense, the results provide a starting point for increasing the transfer of training.

This study had several limitations. A major limitation of the project was the small sample size. Due to the small number of participants in the study and the sampling

methods used, the findings cannot be generalized to other organizations or other professions. I used convenience sampling in the quantitative phase and purposeful sampling for the qualitative phase. However, the results provide a starting point for organizations looking to improve their transfer of training.

The small sample size was a limitation to this project study. To address this limitation, I used convenience sampling to acquire as many participants as possible for the quantitative phase. Another limitation was not being able to generalize the findings to other organizations. To address this limitation, I reviewed research literature on transfer of training, supervisor support, training design, providing the opportunity to use skills on the job, and coaching, and mentoring. I reviewed literature on position papers, white papers, and best practices for transfer of training. Recommendations addressed are supported by current research.

Recommendations for Alternative Approaches

Although I believe the project has several strengths, there are alternative approaches to improving transfer of training in the organization. One alternative is creating a professional development program to train supervisors and managers on how to coach employees on transferring skill back to the job after attending leadership development training sessions. The initial sessions could be followed up by shorter online refresher sessions. Another alternative approach to address the local problem might include conducting an evaluation study to determine the effectiveness of leadership development training. The evaluation study could focus at not only the perceptions of the

trainees, but on the instructional strategies used in the class that impact transfer of training back on the job.

Scholarship, Project Development and Evaluation, and Leadership and Change

From the completion of the necessary coursework, development of the project study, the planning and implementation, and conducting research for the actual project, I learned what it takes to be a scholar. The perseverance, dedication, and time commitment necessary to complete a doctoral study was much higher than I anticipated. I now know how to think more like a researcher, how to ask more effective questions, and how to use resources to be successful. This project reinforces the necessary rigor and discipline needed to complete the program.

I learned that project development is a systematic process and is tactical in nature. In both my former role in training and development and my current role in organizational change management, I use problem-solving and research on a daily basis. The project development provided me with a different and more structured approach to research and support my recommendations based on the research. I also gained a deeper understanding of factors that hinder or contribute to the transfer of training and possible solutions from the trainees' perspective.

I am an organizational change management consultant and have a high degree of responsibility for making recommendations to support leaders in helping their employees through change. This project contributed to reinforcing many of the practices I currently use as a change management practitioner. Change does not happen due to leadership alone; employees often provide the catalyst for a change by identifying the need for a

change to happen and providing the momentum for moving the change forward. These

change agents can be instrumental in creating alignment between the recommendations in

the policy paper and associated transfer of training activities.

<h3 style="text-align:center">Reflection on the Importance of the Work</h3>

The most significant insight into the analysis of myself as a scholar is that it takes

self-initiative, drive, and perseverance to succeed. My love of learning helped me make

it this far in the process. The learning journey associated with conducting mixed-

methods research far exceeded my depth of knowledge initially. My ability to use some

of the strategies for transfer of learning has allowed me to do research for the project and

to apply some of my new learnings to my current role.

This project confirmed my passions for training and development. It also

confirmed my desire to help others succeed by identifying and using research and best

practices. According to the findings from this research, often past practices need to be

looked at and revised to move forward. It is important to me as a practitioner to

continually review literature, ask questions, and be willing to adopt new ideas and

practices into my work.

This project reaffirmed the knowledge, skills, and expertise required to be a

project developer. As a project developer, I needed to be organized, be able to manage

my time effectively, and be able to write clearly and concisely. Additionally, new skills

and abilities were required. As a project developer, I needed to be able to conduct

literature searches, collect and analyze data, and learn to write like a scholar. It was also

important to be able to locate and use resources provided by Walden University such as

tutorials, templates, rubrics, and research resources. These resources were valuable in completing the project.

It is essential that organizations use strategies to enhance transfer of training if an organization is going to reap benefits from its investment in training. With the recommendations made in this position paper, stakeholders in the organization would be better equipped with the knowledge and skills needed to encourage trainees to transfer skills taught in training back to the workplace. Additionally, I believe leaders have an obligation to help employees be successful in the workplace and create the right environment. The transfer of training improves an organization's profits and creates collaborative learning environments that benefit the participants and the communities where these participants live and work (Khan et al., 2014; Saks & Burke, 2012). Transfer of learning strategies can enhance on-the-job training and job experiences for employees, thereby reducing stress and anxiety that might be associated with learning new skills or starting a new job.

Implications, Applications, and Directions for Future Research

This research provided a greater understanding of factors that hinder or enhance transfer of training in the organization. This knowledge could be used by the organization to create processes that supervisors use to encourage the transfer of training. This study was limited to one organization with a small sample size; future research also should be conducted with larger sample sizes, across other organizations. Other factors that influence training transfer should be taken into account in future research. For instance, I did not consider the individual or motivational factors (such as self-efficacy,

training design, and peer support) that have been found to influence transfer motivation and/or training transfer (Devos et al., 2007; Gilpin-Jackson & Bushe, 2007; Martin, 2010a; Martin, 2010b; Velada et al., 2009). Existing models of training transfer incorporate many of these factors to explain how and why training transfer occurs (Baldwin & Ford, 1988).

I highlight the integral role that mentors and supervisors play in helping employees successfully transfer what they learned in training to the job. Therefore, there are several implications for practice. First, supervisors should make arrangements for employees to receive post training support to improve the likelihood that they will transfer what they learned. This is particularly important when employees are new because they will likely have many questions about how to apply what they learned in training. Second, leaders should coach mentors and supervisors about the behaviors they should exhibit to help employees transfer what they learned. Practices such as providing feedback, being available to answer questions, and helping employees overcome obstacles can facilitate training transfer. Lastly, training professionals should consider offering new hires formal training that occurs in a classroom-type setting and provides them with hand-outs that they can refer to when attempting to transfer what they learned in training once back on the job. Offering formal training to new employees may facilitate training transfer by providing them with standards and expectations and a common language from which to work with their mentors.

Conclusion

Identifying various recommendations to support the transfer of training continues to be a challenge for the organization to prioritize due to time and money constraints. As Ellinger (2013) noted, managers or supervisors serving as a coach in the workplace facilitate the transfer of training. Managers and supervisors play a role in the transfer of training. Although this study has limited generalizability due to the size and focuses on only one nonprofit organization, the impact on transfer of training could be significantly enhanced. In a larger context, effective transfer of training may lead to higher productivity in the organization and positively contribute to return on investment (De Grip & Sauermann, 2013). The findings in this study and subsequent recommendations revealed deficiencies that were affecting the transfer of training.

Supervisor support, training design, opportunity to use skills on the job, and performance coaching and mentoring influence transfer of training. More importantly, the findings of this study reinforce the need to provide a framework for transfer of training that supervisors, trainees, and trainers can reference to support transfer of training in the organization. The strength of this study was the mixed-methods methodology. Being thrust into the role of scholar, project developer, practitioner, and leadership change agent changed my perception of how research can impact social change. This study can add value to organizations in achieving business outcomes through training, creating a learning experience that ensures return on training investment, and contributing to research on transfer of training in nonprofit and for-profit organizations.

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Appendix A: The Project

Position Paper: Creating a Transfer of Training Work Environment

Through Supervisor Support, Training Design Opportunity, and Coaching

Transfer of Training Project

September 2016

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Introduction

Creating a Transfer of Training Work Environment project is designed to improve transfer of training through the use of supervisor support, training design, providing opportunities for participants to use the skills taught back in the work environment and coaching and mentoring,   This position paper specifically focuses on best practices of providing supervisor support, enhancing training design, providing opportunities for participants to practice the skills, and performance coaching and mentoring, once they are back in the work environment.

Overview of the Study

A mixed methods methodology was used for this study which allowed the collection of both quantitative and qualitative data on the transfer of training. This project study consisted of collecting quantitative data using the LTSI survey instrument (Appendix F) from 60 participants who attended leadership development courses within the past two years. This was followed by conducting individual interviews with eight people. The criteria used to select candidates to interview included selecting eight participants who volunteered to participate in the interviews. Four individuals were selected who indicated high levels of supervisor support based on the on the LTSI results and four individuals who indicated lower supervisor support. Once the data were analyzed, four main themes emerged as factors that could enhance transfer of training in the organization:

- Supervisor support

- Training design

- Opportunity to use skills

- Performance coaching and mentoring

Target Audience

The strategies and activities identified in this project are intended to lay a solid

basis for transfer of training in the organization and to increase awareness for the

importance of transferring skills back to the workplace. The primary audience designed

to benefit from these strategies are supervisors and managers attending leadership

development training in the organization. Every director, vice president, manager, and

human resource representative are stakeholders in the successful implementation of the

project.

Proposed Implementation Timeline

There are several steps upon completion of this project to implement. First, I will

share the outcomes of this project with the organizational stakeholders. The stakeholders

include the VP of Human Resources and Corporate HR Directors. Next, the VP of

Human Resources and the HR Directors would need to build a team to identify the

suggestions and strategies, if any, they choose to implement in the organization and

further develop policies that would align the strategies with organizational policies.

Third, a communications plan would need to be designed and communicated to inform

the organization of the policies and guidelines on transfer of training.   Table A1 shows

the timelines for preparing to implement this project, steps involved in the process, and

the participants participating in each step. The recommended strategies begin before the

leadership training starts and continue after the trainee is back on the job.

Table A1

Scope and Sequence Project Preparation Timeline

Timeline	Steps	Owner(s)	Notes
Month 1	Present the project outcomes and recommendations to the stakeholders.	Researcher	
Month 2	Form a team to review recommendations and determine what to include. Identify assessments to be used (if any).	VP of HR HR Directors HR Managers Organizational Trainers	
Month 3	Team meeting to finalize the project plan.	VP of HR HR Directors HR Managers	
Month 4	Modify, update, or develop any policies required	VP HR HR Directors	
Month 4	Develop a communications plan	Corporate HR Director	
Month 5	Train coaches	To Be Determined	Based on what coaching model is used
Month 6	Send out communications Implement	VP HR	

Table A2 outlines the recommended implementation activities and approximate

times for each activity for the trainer, trainee, coach and supervisor to follow. The table

starts with activities to do before trainees attend the training session. Then the table

describes activities to do during the training and finishes with suggested activities to

follow up after the training has ended.

Table A2

Suggested Implementation Activities

	Activity	Participants	Duration	Notes
Before	Train organizational coaches	Trainer/ Facilitator, Coaches	Based on Coaching Model	
	Ensure trainee is aware of training date and length of training	Supervisor	5 minutes	One time
	Have pre-training discussion with employee on how training ties into performance and business results	Supervisor, Trainee	30 minutes	One time
	Pre-test	Trainer/ Facilitator, Trainee	15 minutes	One time
	Administer self-assessment tool (if applicable) and debrief trainee on results	Certified Assessor, Trainee	90 minutes	One Time
	Follow up on pre-work assignment(s) to ensure completed	Trainer/ Facilitator, Trainee	5 minutes	One time
	Pair trainee and coach	HR or designated representative	30 minutes	One time
	Hold initial coaching contract meeting	Trainee, Coach	30 minutes	One time
During	Have trainee set 2 – 3 goals based on training content (have the trainee place in pre-addressed envelope)	Trainer/ Facilitator, Trainee	15 minutes	One time
	Use interactive teaching methods	Trainer/ Facilitator	Class duration	
	Use "real" work challenges in training delivery	Trainer/ Facilitator	Class duration	As appropriate
After	Follow up with trainee on training and goals set during training session	Supervisor, Trainee	30 minutes	Bi-weekly or monthly
	Create IDP	Supervisor, Trainee	1 hour	Annually
	Send e-mail reminders of training content	Trainer/ Facilitator	5 minutes	Monthly 3 – 6 months following training
	Send goals set during training to trainee's supervisor	Trainer/ Facilitator	5 minutes	One time
	Hold coaching sessions	Trainee, Coach	30 to 60 minutes	Bi-weekly 3 – 6 months

Organizational Benefits from Transfer of Training

The organization derives benefits from having an effective transfer of training strategies in place.   The organization needs effective leadership to survive. While some organizations view training and leadership development as a luxury, others see it as a need. The benefits of leadership development have a direct correlation to bottom line profits (Hayward, 2011). Leadership development may also contribute to a culture of continuous learning, cost savings, performance improvements, and increased profits (Balan, Manko, & Phillips, 2011; Hayward, 2011). Supervisors and managers have a significant influence on the transfer of training, which can improve an organization's profits and create a more collaborative and productive work environment. In additional to organizational benefits, individuals benefit as well.

Individual Benefits from Transfer of Training

The potential for significant growth and development of trainees and increased motivation are all possible individual advantages. Communication can increase between the trainee and the supervisor who can build better relationships between the two (Appelbaum et al., 2012).   Higher job satisfaction has also been identified as a potential benefit for organizations that have environments that support the transfer of training (Appelbaum et al., 2012; Clarke, 2013; Kennedy, 2012).   These benefits are in congruence with statements of the research participants.

<div align="center">

Recommendations

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The institutionalizing of transfer of training for leadership development through the adoption of policy would require a commitment from the organization and investment

in the necessary resources. Current research, along with this project study results,

suggests the use of supervisor support, training design, providing the opportunity to use

skills taught, and performance coaching and mentoring leads to more efficient transfer of

training back to the workplace. This position paper or report presents the

recommendations to improve the transfer of training based on the results of this study.

The purpose of this position paper is to offer data and strategies that will help leaders

within the organization implement strategies that will increase the transfer of training in

the organization. Ultimately, it is at the discretion of the VP of Human Resources and

other leaders in the organization to use the information contained in this project study in a

way that best meets the current needs of the organization. The learning process must

extend beyond the classroom to be effective. Post-training strategies and activities need

to be incorporated in the organization that encourages and allow the participant to use the

skills taught without fear of repercussion or ridicule. The recommendations outlined in

this section include supervisor support, training design, the opportunity to use, and

performance coaching and mentoring.

Supervisor support

Many previous studies have found that supervisor support has an influence on the

transfer of training (Homklin, 2014; Ng, 2013; Ng et al., 2011). Some examples of

supervisor support include helping employees set goals, providing feedback, offering

help when needed, and allowing employees to have input into their learning. Supervisors

can support and promote the transfer of training by applying a few simple strategies

before, during, and after training. Supervisors and managers can communicate the

importance of training and how training ties into achieving the organization's goals and objectives. They can encourage participation in the training sessions and ensure the trainee is not disturbed by work issues while attending training.

Supervisors and managers can review and discuss the trainee's specific needs in relationship to performance standards, and provide coaching to the trainee (Friesen, Kaye, & Associates, 2009; Lancaster et al., 2013). Annually, trainees should be required to meet with their supervisors to build an IDP that ties to the leadership development competencies the organization is trying to build. These research participants strongly suggested the use of IDPs that were customized to their needs and suggested that an IDP would also help create accountability for the transfer of training. The IDPs should then be placed in the individuals Human Resource file. Additionally, supervisors and managers can provide feedback and provide opportunities for trainees to practice the skills taught back on the job.

Training design

Eighty-eight percent of the interviewees identified training design factors that influenced their ability to transfer training. Case studies and role plays that were job specific, having the opportunity to practice the skills in the classroom, discussing job specific situations during the training, and discuss relating theory to the practical application were mentioned by the interviewees. Additionally, providing resources after training and following up by the trainer on commitments and action plans created during the training session were additional suggestions made by the participants in this study. Proper design and delivery are major contributing factors to enhancing transfer of

training. The training needs to be designed and has components that are perceived to be relevant to the learner (Lancaster et al., 2013; Martin, 2010; Pollock, 2014; Pollock & Jefferson, 2012). Fifty percent of the study respondents suggested refresher courses and resources would enhance transfer of training. Several respondents suggested having mini modules either in person or on-line on a regular basis over a six to 12 month period. Communities of practice, or learning communities, are another best practice that can contribute to the effective transfer of training. In these communities of practice, trainees could meet to discuss job-related situations and experiences that tie to the training they have received in class.   Handout # 2 summarizes the strategies for consideration in designing the training.

Opportunity to use skills on the job

Having the chance to practice and use the skills taught in the classroom is on the job is a key contributor to the transfer of training.   Fifty percent of the participants interviewed in this study indicated an opportunity to use the skills back on the job was important for them to be able to master and transfer the skill taught more effectively. According to Kennedy (2012) having the opportunity to use the skills also contributes to job satisfaction and retention as well. In Kennedy's study 63 % of employees listed opportunity to use skills on the job as the most important factor in job satisfaction. Opportunities can arise in the current job or through cross training and stretch assignments. Skills will diminish if employees do not have the opportunity to use them on the job within a reasonable amount of time of learning the skills (Ballesteros & De Saa, 2012). Supervisor support has a direct impact on creating opportunities for

employees (Ballesteros & De Saa, 2012). Supervisors also have the ability to create opportunities for the learner by providing stretch assignments or assigning the worker to projects that will provide the opportunity to utilize the skills taught in the classroom in real time applications.

Performance Coaching and Mentoring

The literature offers many definitions of coaching. For purposes of this paper, coaching is a process that provides people with the tools, knowledge, feedback and opportunities they need to for more effective work performance. The organization has a both coaching and mentoring policies in existence that is designed to support individuals in establishing development plans to increase their performance. However, participation in both programs are voluntarily and not widely used. Coaching can increase skill development and help provide more precise feedback that provides clear guidance and direction to help the learner improve his/her skills on the job (Brown et al., 2013; Sonesh et al., 2015). The Coaching policy needs to have clear support from top leadership in the organization.

Additionally, rather than have a voluntary program, the organization should consider mandating coaching services for all Managers and above before the employee attending leadership development programs. This will give the trainee (employee) and the coach an opportunity to identify specific goals for the leadership training before the participant attending the session. Have a series of mini workshops for managers and supervisors teaching coaching, the knowledge, and skills that are taught in the leadership development programs. Some feedback from participants was that their supervisors had

no idea what was taught in the leadership program because they had never attended the program. Sonesh et al., (2015) found coaching correlates with goal attainment and fosters positive change in behavior. However, there needs to be trust and rapport between the coach and the coachee for coaching to be effective (de Haan, Duckworth, Birch, & Jones, 2013; Gessnitzer & Kauffeld, 2015; Ianiro & Kauffeld, 2014; Passmore & Fillery-Travis, 2011). There are many types of coaching and different terms relating to coaching to include performance coaching, professional or executive coaching counseling mentoring, peer coaching, personal life coaching, etc. This recommendation will focus on performance coaching as defined by the LTSI scale (Appendix G) and mentoring. Coaching and mentoring share a lot of similarities and at times are used interchangeably for this project they are distinct from each other because the organization has separate policies for each. Coaching has been found to have a positive impact on behavioral change with the coachee (Sonesh et al., 2015). If the transfer of training is designed to have an impact on behavioral change, it stands to reason that coaching is a viable tool to use. Coaching is focused more on work performance and mentoring is more focused on overall career goals. Table A3 shows a brief explanation of types of coaching. Both coaching and mentoring can have a positive impact on transfer of training.

Table A3

Three Types of Coaching

	Types of Coaching		
	Performance coaching	**Peer coaching (subset of performance coaching)**	**Mentoring**
Target audience	Employees	Employees or executives	Individuals or employees
Coach role	Manager, HR, designated internal coach	Peers, trainer(s)/facilitators	Trusted advisor, higher level manager or executive inside or outside the organization
Purpose of coaching	The extent to which individuals receive constructive input, assistance, and feedback from people in their work environment when applying new abilities or attempting to improve job performance. More focused on job performance outcomes	Provide personal or professional support and feedback when applying new skills. More focused on job performance outcomes	Provide feedback on career-related goals; help navigate corporate politics; help network. More focused on career outcomes

Organizations have an obligation to support employees in an organization when they
are learning new skills and behaviors. Therefore, the organizations' leadership must
utilize the resources they have available to ensure transfer of training takes place. The
coaching relationship involves (a) assessing the goals of the coachee, (b) providing a
coach, and (c) having the coach provide feedback to the individual.

Potential Barriers

The organization needs to be aware of possible barriers to stakeholders participating in the activities recommended for improving the transfer of training in the organizations. These barriers include the time and effort supervisors, and managers need to dedicate to completing suggested pre, during and post activities with the trainees. The insufficient number of coaches per trainee and inadequate training of the coaches. Another barrier is the time commitment on the part of the trainee or the trainers. Another potential barrier is a lack of staff. Currently, there are only two organizational trainers serving all locations. Also, all district leaders may not be in support regarding the time needed for staff to act in the role of coaches or mentors. It will be difficult to convince those leaders to build time into the typical workday to support these activities unless they perceive that the activities add value.

Summary

This project focused on recommendations for transfer of training based on study participant's recommendations, literature reviews, and best practices. Transfer of training may be a vehicle for organizational change. Four themes to improve the transfer of training emerged from the study: (a) supervisor support, (b) training design (c) opportunity to use, and (d) performance coaching and mentoring. This project recommended strategies for each of the four themes. Trainees who participate in leadership develop and can apply those skills on the job have indicated higher productivity, greater job satisfaction, and the likelihood to remain with the organization

for a longer period. In a larger context, well-trained employees may make more useful

contributions to the organization's bottom line profit. With a skilled workforce, the

organization will be in a positive to be more competitive in today's competitive

marketplace.

Handout #1
Supervisor Support for Transfer of Training

Introduction

Literature and best practices indicate supervisor support is a critical component for improving the transfer of training. Supervisor support measures "the extent to which supervisors or managers support and reinforce the use of training on the job". The results of this study support the literature research. Participants who received support from supervisors were more likely to indicate that transfer of learning had taken place.

Tips

- Supervisors can ensure the trainee has advance notice of the training session
- Discuss the trainee's specific needs about the training and how the training ties into business results
- Provide time before training for the trainee to complete any required pre-work for the course
- Do not contact the trainee for work related issues during the training
- Follow up with the trainee immediately after the training
- Follow up again at regularly scheduled periodic intervals
- Meet with the trainee and discuss what on-the-job behaviors or actions are expected from the trainee as a result of attending the training
- Have trainees submit a post-training report to the supervisor/manager
- Ensure professional development is part of the annual performance appraisal plan
- Create an IDP based on the goals of the training

Success Factors

- Get supervisors involved in the training process before the class start date
- Ensure supervisors know and understand the program content and the business outcomes expected as a result of the training. If possible, provide training for supervisors in advance of their employees attending the training
- Hold supervisors accountable for having pre and post-training discussions with their direct reports
- Provide the trainee with the time needed to be able to practice the skills on the job
- Reward or praise employees when they effectively use the skills on the job
- Good listening skills

Handout #2
Training Design

Introduction
Training design can play a major role in improving the transfer of training back on the job. "The only reason the learning function exists is to drive business outcomes" (Smith, 2011, p.10). Training design can be made more effective by ensuring the learning objectives tie into the organization's goals and desired business outcomes.

Tips
- Pretest to identify existing knowledge
- Ensure the supervisors of the trainees understand the course content so they can reinforce it.
- Create a handout for supervisors, so they can have conversations with the attendees before the leadership development course
- Use interactive teaching methods and vary the methods used
- Ensure content, case studies and role plays are relevant to the trainee
- Build goal setting into the training on what they will practice after the session (action plans)
- Have each trainee set 2 – 3 goals during training, write the goals down and send to their supervisor after the training
- Build opportunities to reward trainees during class when the learn and perform new skills
- Have an evaluation of the training immediately after, 30 days after and six months after to measure retention and application
- Follow up on goal setting (if applicable) builds accountability
- Have refresher sessions, offer mini (30 – 45 minute) on-line sessions to follow up and discuss training topics
- Build in peer learning and project teams
- Show link between the training and the job
- Give specific examples of how the training can be used back on the job
- Send e-mail reminders that require thinking about the training materials and concepts taught.
- Have participants bring "real" work challenges to the class and use it to create an action plan

Success Factors
- Communicate training successes
- Market training and clearly show the link between training and the organization's business outcomes
- Know the target audience and show them what's in it for them

Handout #3
Performance Coaching

Introduction

Implementing a performance coaching/mentoring process can help ensure training does not stop when the training session ends and participants walk out of the classroom. Coaching and mentoring share a lot of similarities and at times are used interchangeably for this project they are distinct from each other because the organization has separate policies for each. Coaching and mentoring can be delivered by internal coaches, external coaches, peers, HR representatives, supervisors or managers of the participants.

Tips

- Revise the existing policy to mandate coaching for all managers before them attending the Leadership Development program

- Identify managers and directors who have previously participated in the Leadership Development training to act in the role of coach

- Encourage them to volunteer to serve in the role of coaches

- Identifying a consistent coaching model to use throughout the organization. One suggestion is the ASTD COACH Model from the Coaching Certificate Program (American Society of Training and Development, 2013a).

- Create an internal Coaching Certification program on how to be an active coach

- Create a pre-training Coaching Assessment to identify the goals of the coachee and to best match the coach and coachee

- Communicate the program to the organization through a variety of communication tools, i.e. Newsletters, intranet, in Leadership classes, meetings

- Allow time during the workday for the coach and coachee to meet

- Create a Coaching Agreement Form

- Create and update the existing Coaching Evaluation Form and use the data collected to continue to improve the coaching process

- Create a self-assessment tool for pre and post coaching measurement use another assessment tool that the organization is using such as DISC, CCL Benchmark Assessment, or Emotional Intelligence Assessments, etc.

Success Factors

- Training coaches and mentors in the organization

- Measure outcomes of the coaching relationship

- Build support for the coaching process in the organization

- Follow up to ensure coaching conversations happen

- Good listening skills

Project Overview Presentation

Slide 1

Position Paper:

Creating a Transfer of Training Work
Environment Through, Supervisor Support,
Training Design Opportunity, and Coaching

Presenter:

Presentation Date:

1

Slide 2

Agenda

- Overview of Study Results
- Benefits from Transfer of Training Strategies
  - Organizational Benefits
  - Individual Benefits
- Recommendations
  - Supervisor Support
  - Training Design
  - Opportunity to Use the Skills on the Job
  - Performance Coaching & Mentoring

2

Slide 3

Overview of Study Results Demographics	N	Percent
Gender		
Female	17	28.3
Male	43	71.7
Position		
Supervisor	20	33.3
Manager	23	38.3
Director	15	25.0
Other	2	3.3
Reasons for Attending		
Personal growth	8	13.3
Job Related	45	75.0
Required/other	7	14.7
Location		
District 1	36	60.0
District 2	16	26.7
Corporate	8	13.3
Age		
< 26	2	3.3
26-35	12	20.0
36-45	20	33.3
46-55	14	23.3
56-65	10	16.7
66 or older	2	3.3

3

Slide 4

Slide 5

Slide 6

Slide 7

Benefits from Transfer of Training Strategies

Organizational Benefits
- Culture of continuous learning
- Cost Saving
- Performance Improvements
- Increased Profits
- Greater ROI on Training

Individual Benefits
- Significant Growth and Development
- Increased Motivation
- Higher Job Satisfaction
- Improved Communication

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Slide 8

Recommendations: Supervisor Support

Recommended Roles of a Manager		
Before Training	**During Training**	**After Training**
• Ensure trainee has advance notice of the training session • Understand the course goals and objectives themselves • Discuss the trainees specific needs in relation to the training • Provide time to complete pre-work materials • Have a conversation with the trainee prior to the training session to communicate importance of training in relationship to reaching organizational and individual goals • Encourage active participation in the training session • Build transfer of training expectation into annual performance appraisals	• Ensure trainee is not called/contacted during the training • Monitor trainees attendance • Contact facilitator(s) to get feedback on trainees	• Review the goals the trainee set in training (if that strategy has been incorporated) • Follow up immediately and get trainees perception of the course • Follow up again at periodical intervals • Discuss what behaviors or action will change as a result of the training • Have trainees present a short presentation to team on what they have learned • Provide on-the-job opportunities to practice • Provide feedback and coaching (positive reinforcement) • Have trainees submit a post-training report to the supervisor or manager • Ensure Professional Development is part of the annual performance management plan

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Slide 9

Recommendations: Training Design

Training Design		
Before Training	During Training	After Training
• **Pretest to identify existing knowledge** • **Ensure content is relevant to the trainees** • **Build on pre-work Ensure the mangers/supervisors of the participants know what the course content is.** • **Create a handout for managers so they can have conversations with the attendees prior to the leadership development course**	• **Use interactive teaching methods, vary the training methods used** • **Ensure case studies and role plays are relevant both to the content and to the trainee** • **Build periodic Summaries into the training** • **Build goal setting in to the training on what they will practice after the session (action plans)** • **Have each trainee set 2 – 3 goals during training, write the goals down and send to their supervisor after the training** • **Build opportunities to reward trainees during class when the learn and perform new skills** • **Show link between the training and the job** • **Give specific examples of how the training can be used back on the job**	• **Have an evaluation of the training immediately after, 30 days after and six months after to measure retention and application** • **Follow up on goal setting (if applicable) builds accountability** • **Have refresher sessions** • **Offer mini (30 – 45 minute) on-line sessions** • **Build in peer learning and/or project teams** • **Send email reminders that require thinking about the training materials and concepts taught**

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Slide 10

Recommendations: Opportunity to Use the Skills on the Job

Fifty percent of the participants interviewed in this study indicated opportunity to use the skills back on the job was important for them to be able to more effectively master and transfer the skills taught.

- **Cross Training**
- **Stretch Assignments**
- **Reduce workload to allow participation on special projects**
- **Create opportunities based on goals set in the training session**
- **Allow trainees the opportunity to practice coaching, providing feedback, and correcting their direct reports while being observed by the trainer, HR, coach, or mentor. Than have the individual(s) observing provide feedback.**

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Slide 11

Recommendations: Performance Coaching & Mentoring

Types of Coaching			
	Performance Coaching	**Peer Coaching (sub set of performance coaching)**	**Mentoring**
Target Audience	Employees	Employees or executives	Individuals or employees
Coach Role	Manager, HR, designated internal coach	Peers, trainer(s)/facilitators	Trusted advisor, higher level manager or executive inside or outside the organization
Purpose of Coaching	The extent to which individuals receive constructive input, assistance, and feedback from people in their work environment when applying new abilities or attempting to improve work performance. More focused on work performance outcomes	Provide personal or professional support and feedback when applying new skills. More focused on work performance outcomes	Provide feedback on career-related goals; help navigate corporate politics; help network. More focused on career outcomes

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Slide 12

Coaching Recommendations

- Revise the existing policy to mandate coaching for all managers prior to them attending the Leadership Development program

- Identify managers and directors who have previously attended the Leadership Development training to act in the role of coach

- Encourage them to volunteer to act in the role of coaches

- Identifying a consistent coaching model to use throughout the organization. One suggestion is the ASTD COACH Model from the Coaching Certificate Program that several people in the organization attended.

- Provide training to the coaches on how to be an effective coach

- Create a pre-training Coaching Assessment (see sample below) to identify the goals of the coachee and to best match the coach and coachee

- Communicate the program to the organization through a variety of communication tools, i.e. Newsletters, intranet, in Leadership classes, and in team meeting

- Allow time during the workday for the coach and coachee to meet

- Create a Coaching Agreement Form Create and/or update the existing Coaching Evaluation Form and use the data collected to continue to improve the coaching process

- Create a self-assessment tool for pre and post coaching measurement such as DISC, CCL Benchmark Assessment, or Emotional Intelligence Assessments etc.

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Slide 13

Resources

American Society of Training and Development. (2013). *Coaching Certificate Program Participant Guide.* **Alexandria, VA: ASTD Press.**

Pollock, R. V. (2014). *The Field Guide to the 6*Ds: Wiley. Retrieved from http://www.ebrary.com

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Wick, C. W., Jefferson, A., & Pollock, R. V. (2015). *The six disciplines of breakthrough learning: How to turn training and development into business re*sults (3rd ed.). John Wiley & Sons.

https://studysites.sagepub.com/vannieuwerburgh/study/TemplateforCoachingContract.pdf
www.drdarryl.com/PersonalCoach/coaching-templates

13

Slide 14

Wrap Up

14

Appendix A: References

American Society of Training and Development. (2013). *Coaching Certificate Program Participant Guide.* Alexandria, VA: ASTD Press.

Coaching Template Sample https://studysites.sagepub.com/vannieuwerburgh/study/

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Wick, C. W., Jefferson, A., & Pollock, R. V. (2015). *The six disciplines of breakthrough learning: How to turn training and development into business results* (3rd ed.). John Wiley & Sons.

Appendix B: Permission for Figure 1 Baldwin and Ford's Transfer Model

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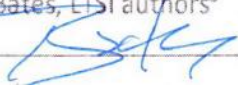**Learning Transfer Systems Inventory User's Agreement**

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Purpose	Research to complete doctorate degree and provide valuable feedback to my organization on is identifying factors that inhibit or contribute to transfer of learning for supervisors who have attended a leadership development training program.
Time Period	Dates are approximate based on when I receive approval to begin collecting data. June 2014 through June 2015
Other Conditions	The instrument can be reproduced in my dissertation
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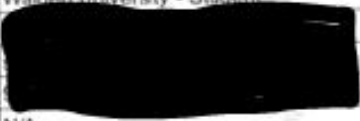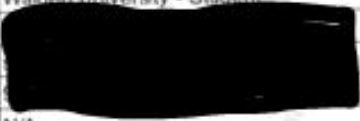
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Appendix F: LTSI

<div style="border:1px solid black; text-align:center;">

LEARNING TRANSFER SYSTEM INVENTORY

</div>

Please circle the number (1, 2, 3, 4 or 5) to the right of each item that most closely reflects your opinion about training.

1 - Strongly disagree   2 - Disagree   3 - Neither agree nor disagree
4 - Agree   5 - Strongly agree

For the following items, please think about <u>THIS SPECIFIC TRAINING PROGRAM</u> :

1.	Prior to this training, I knew how the program was supposed to affect my performance.	1	2	3	4	5
2.	This training will increase my personal productivity.	1	2	3	4	5
3.	When I leave this training, I can't wait to get back to work to try what I learned.	1	2	3	4	5
4.	I believe this training will help me do my current job better.	1	2	3	4	5
5.	Successfully using this training will help me get a salary increase.	1	2	3	4	5
6.	If I use this training I am more likely to be rewarded.	1	2	3	4	5
7.	I am likely to receive some recognition if I use my newly learned skills on the job.	1	2	3	4	5
8.	Before this training, I had a good understanding of how it would fit my job-related development.	1	2	3	4	5
9.	I knew what to expect from this training before it began.	1	2	3	4	5
10.	I don't have time to try to use this training on my job.	1	2	3	4	5
11.	Trying to use this training will take too much energy away from my other work.	1	2	3	4	5
12.	Employees in this organization will be penalized for not using what they have learned in this training.	1	2	3	4	5
13.	I will be able to try out this training on my job.	1	2	3	4	5
14.	There is too much happening at work right now for me to try to use this training.	1	2	3	4	5
15.	If I do not use new techniques taught in this training I will be reprimanded.	1	2	3	4	5
16.	If I do not utilize this training I will be cautioned about it.	1	2	3	4	5
17.	The resources needed to use what I learned in this training will be available to me.	1	2	3	4	5

Please turn to the next page

	1 - Strongly disagree 2 - Disagree 3 - Neither agree nor disagree 4 - Agree 5 - Strongly agree

18. My colleagues will appreciate my using the new skills I learned in this training.   1   2   3   4   5

19. My colleagues will encourage me to use the skills I have learned in this training   1   2   3   4   5

20. At work, my colleagues will expect me to use what I learned in this training.   1   2   3   4   5

21. My supervisor will meet with me regularly to work on problems I may be having in trying to use this training.   1   2   3   4   5

22. My supervisor will meet with me to discuss ways to apply this training on the job.   1   2   3   4   5

23. My supervisor will oppose the use of techniques I learned in this training.   1   2   3   4   5

24. My supervisor will think I am being less effective when I use the techniques taught in this training.   1   2   3   4   5

25. My supervisor will probably criticize this training when I get back to the job.   1   2   3   4   5

26. My supervisor will help me set realistic goals for job performance based on my training.   1   2   3   4   5

27. The instructional aids (equipment, illustrations etc.) used in this training are very similar to real things I use on the job.   1   2   3   4   5

28. The methods used in this training are very similar to how we do it on the job.   1   2   3   4   5

29. I like the way this training seems so much like my job.   1   2   3   4   5

30. It is clear to me that the people conducting this training understand how I will use what I learn.   1   2   3   4   5

31. The trainer(s) used lots of examples that showed me how I could use my learning on the job.   1   2   3   4   5

32. The way the trainer(s) taught the material made me feel more confident I could apply it in my job.   1   2   3   4   5

33. I will get opportunities to use this training on my job.   1   2   3   4   5

Please turn to the next page

Please complete questions 34 - 48 below.
Note that these items have new instructions.
Please read them carefully.

1 - Strongly disagree   2 - Disagree   3 - Neither agree nor disagree
4 - Agree   5 - Strongly agree

For the following items, please <u>THINK ABOUT TRAINING IN GENERAL</u> in your organization.

34.	My job performance improves when I use new things that I have learned.	1 2 3 4 5
35.	The harder I work at learning, the better I do my job.	1 2 3 4 5
36.	For the most part, the people who get rewarded around here are the ones that do something to deserve it.	1 2 3 4 5
37.	When I do things to improve my performance, good things happen to me.	1 2 3 4 5
38.	The more training I apply on my job, the better I do my job.	1 2 3 4 5
39.	My job is ideal for someone who likes to get rewarded when they do something really good.	1 2 3 4 5
40.	Experienced employees in my group ridicule others when they use techniques they learn in training.	1 2 3 4 5
41.	People in my group are not willing to put in the effort to change the way things are done.	1 2 3 4 5
42.	My workgroup is reluctant to try new ways of doing things.	1 2 3 4 5
43.	People often make suggestions about how I can improve my job performance.	1 2 3 4 5
44.	I get a lot of advice from others about how to do my job better.	1 2 3 4 5
45.	I never doubt my ability to use newly learned skills on the job.	1 2 3 4 5
46.	I am sure I can overcome obstacles on the job that hinder my use of new skills or knowledge.	1 2 3 4 5
47.	At work, I feel very confident using what I learned in training even in the face of difficult or taxing situations.	1 2 3 4 5
48.	People often tell me things to help me improve my job performance.	1 2 3 4 5

Please complete questions 49 -53 on the following page.

49. What was the TITLE of the training program you have just attended? _____

50. What was the LENGTH of the training program you have just attended? (tick the correct circle)

   O Less than 1 day
   O 1 day
   O 2 days
   O 3 days
   O 4 days
   O 5 days
   O 6 days
   O 7 days
   O More than 7 days

51. What is your gender?

   O Female
   O Male

52. What is your JOB TITLE? _____

53. Including this training, how many work-related training programs provided by this organization have you attended in the last 12 months?

   O 1 program
   O 2
   O 3
   O 4
   O 5
   O 6
   O 7
   O 8
   O 9
   O 10 or more programs

54. My main goal for engaging in this learning experience was . . . (check the one that best fits)

   O Personal growth
   O Develop job-related knowledge or skills

55. What is your age?

   O Less than 26 years of age
   O 26-35
   O 36-45
   O 46-55
   O 56-65

O 66 years or older

56. What Region are you assigned to?

O District 1
O District 2
O Corporate Office

57. Would you be willing to participate in a 30 - 45 minute follow-up interview within the next few weeks? The interviews will be confidential and only I, the researcher, will have access to any information your share. The purpose is to further explore what can specifically be done to enhance transfer of learning for supervisors who attend professional development training. If you answer yes, please provide your contact information.

O Yes
O No

If yes, please add your contact information:

Appendix G: LTSI Scale Definitions

Usage Notes:
The Learning Transfer System Inventory (LTSI) is a fourth generation instrument and is based on extensive research. The 48 items in version 4 of the LTSI measures 16 factors that influence learning transfer in organizations. The factor definitions listed below have demonstrated construct validity based on factor analysis with a database of over 6,000 respondents from nearly 20 different countries representing a wide variety of industries, jobs, company types, and levels of employees.

LTSI Scale Descriptions

Scale Name	Scale Definition	Scale Description
Trainee Characteristics Scales		
Learner Readiness	The extent to which individuals are prepared to enter and participate in a training program.	This factor addresses the degree to which the individual had the opportunity to provide input prior to the training, knew what to expect during the training, and understood how training was related to job-related development and work performance.
Performance Self-Efficacy	An individual's general belief that they are able to change their performance when they want to.	The extent to which individuals feel confident and self-assured about applying new abilities in their jobs, and can overcome obstacles that hinder the use of new knowledge and skills.
Motivation Scales		
Motivation to Transfer Learning.	The direction, intensity and persistence of effort toward utilizing in a work setting skills and knowledge learned in training.	The extent to which individuals are motivated to utilize learning in their work. This includes the degree to which individuals feel better able to perform, plan to use new skills and knowledge, and believe new skills will help them to more effectively perform on-the-job
Transfer Effort— Performance Expectations	The expectation that effort devoted to transferring learning will lead to changes in job performance.	The extent to which individuals believe that applying skills and knowledge learned in training will improve their performance. This includes whether an individual believes that investing effort to utilize new skills has made a difference in the past or will affect future productivity and effectiveness.

Scale Name	Scale Definition	Scale Description
Performance— Outcomes Expectations	The expectation that changes in job performance will lead to outcomes valued by the individual.	The extent to which individuals believe the application of skills and knowledge learned in training will lead to recognition they value. This includes the extent to which organizations demonstrate the link between development, performance, and recognition, clearly articulate performance expectations, recognize individuals when they do well, reward individuals for effective and improved performance, and create an environment in which individuals feel good about performing well.
Work Environment Scales		
Performance Coaching	Formal and informal indicators from an organization about an individual's job performance	The extent to which individuals receive constructive input, assistance, and feedback from people in their work environment (peers, employees, colleagues, managers etc.) when applying new abilities or attempting to improve work performance. Feedback may be formal or informal cues from the workplace.
Supervisor Support	The extent to which managers support and reinforce the use of learning on-the-job.	This includes managers' involvement in clarifying performance expectations after training, identifying opportunities to apply new skills and knowledge, setting realistic goals based on training, working with individuals on problems encountered while applying new skills, and providing feedback when individuals successfully apply new abilities.
Supervisor Opposition	The extent to which individuals perceive negative responses from managers when applying skills learned in training.	This includes when managers oppose the use of new skills and knowledge, use techniques different from those taught in training, do not assist individuals in identifying opportunities to apply new skills and knowledge, or provide inadequate or negative feedback when individuals successfully apply learning on-the-job.

Scale Name	Scale Definition	Scale Description
Peer Support	The extent to which peers reinforce and support use of learning on-the-job.	This includes the degree to which peers mutually identify and implement opportunities to apply skills and knowledge learned in training, encourage the use of or expect the application of new skills, display patience with difficulties associated with applying new skills, or demonstrate appreciation for the use of new skills
Resistance to Change	The extent to which prevailing group norms are perceived by individuals to resist or discourage the use of skills and knowledge acquired in training.	This includes the work groups' resistance to change, willingness to invest energy to change, and degree of support provided to individuals who use techniques learned in training.
Personal Outcomes-Positive	The degree to which applying training on the job leads to outcomes that are positive for the individual.	Positive outcomes include: increased productivity and work effectiveness, increased personal satisfaction, additional respect, a salary increase or reward, the opportunity to further career development plans, or the opportunity to advance in the organization.
Personal Outcomes—Negative	The extent to which individuals believe that if they do not apply new skills and knowledge learned in training that it will lead to outcomes that are negative.	Negative outcomes include: reprimands, penalties, peer resentment, reassignment to undesirable jobs, or reduced opportunities for further job or career development.
Ability Scales		
Opportunity to Use Learning	The extent to which trainees are provided with or obtain resources and tasks on the job enabling them to use the skills taught in training.	This includes an organization providing individuals with opportunities to apply new skills, resources needed to use new skills (equipment, information, materials, supplies), and adequate financial and human resources.
Personal Capacity for Transfer	The extent to which individuals have the time, energy and mental space in their work lives to make changes required to transfer learning to the job.	This factor addresses the extent to which individuals' work load, schedule, personal energy, and stress-level facilitate or inhibit the application of new learning on-the-job.

Scale Name	Scale Definition	Scale Description
Perceived Content Validity	The extent to which the trainees judge the training content to accurately reflect job requirements.	This factor addresses the degree to which skills and knowledge taught are similar to performance expectations as well as what the individual needed to perform more effectively. It also addresses the extent to which instructional methods, aids, and equipment used in training are similar to those used in an individual's work environment.
Transfer Design.	The extent to which training has been designed to give trainees the ability to transfer learning to job application.	The extent to which the training program is designed to clearly link learning with on-the-job performance through the use of clear examples, methods similar to the work environment, and activities and exercises that clearly demonstrate how to apply new knowledge and skills.

Appendix H Interview Questions

Main qualitative research question: What can be done to enhance transfer of learning after attending leadership development courses at the organization?
Consent form, remind the participant this will be recorded, date, interviewee code.

Started with defining Transfer of Learning – are we able to take what is taught in the classroom and successful apply it back on the job?

Questions	Response	Interviewer Notes

1. What contributes to your ability to use skills taught in leadership development courses in the workplace?
2. What hinders your ability to use the skills taught back in the workplace?
3. What else influences whether or not you use skills taught in the leadership development program you attended back at work?
4. In what ways does your immediate supervisor play a role in whether or not you use the skills taught in the recent leadership development program you attended?
5. Any other suggestions or recommendations you have that would help supervisors in implementing the leadership skills taught in training?

Probing Questions – asked as needed
How do you feel about that?
What do you mean by that?
Can you give me an example?
Can you tell me more?
Do you personally feel that way?
Can you expand on your answer?
(Bogdan & Bilken, 2007)

Wrap up Questions
6. Thank you for all that valuable information, is there anything else you'd like to add before we end?
7. Is there anything else I should have asked?

Appendix I: Sample Qualitative Interview Transcript

Interview #3

I: If you are OK with that, I originally scheduled an hour, I have not had one interview that has gone beyond 30 minutes and I actually had one that had gone twelve that surprised me, so the way the process will work. I only have 5 or 6 questions to ask you eh about the transfer of learning. And what the transfer of learning is, it's like what if anything are we doing to enhance transfer of learning after someone attends leadership development. And um, and so that is basically are you able to take what you learned in class and apply it. There are a variety of reasons why the answer could be yes, or the answer could be no, or it could be all over the place so

P: right,

I: After I do the questions and I type as I go um I will send you a copy of the responses and I just need to look over it just so that you know, and these are all going to be rolled up there is nothing that is going to say "P said" chuckles.

P: OK, Ok,

I: You know rolled up and consolidated and if I capture responses anything that identifies anyone I remove that. So, I'll just send you the transcripts, you'll look over the responses and say yes, she captured it or no, that's not what I meant and then give me some feedback on it. So, does that work for you?

P: Yes, that's fine.

I: OK Do you have any questions on the process and how it'll work?

P: No, everything's fine, I understood.

I: OK, great so if any of my questions are not clear please jump in there and ask and I will clarify.

P: OK

I: I want to start off with asking first off and this is thinking back in to some of the leadership development classes that you have attended. What contributes, if anything, to your ability to use the skills that were taught in the leadership development course back in the workplace?

P: Probably the biggest thing that contributes to my ability to utilize what I've learned is the need to do it soon after you return to the office. Um, So many things we learn in leadership development classes are things we don't utilize right away or often, and those are the things that have a tendency to slip by the wayside, Things you learn that you are going to use on a daily basis or even a weekly basis it's more prevalent so it's fresher in your mind and you retain it because you're thinking "Oh yeah, I can use what I just got out of that class you know.

I; ok… um… Now, on the same token, you know just thinking about your role and all of the many things that you do, what hinders your ability to use the skills that are taught back in the workplace?

P: What would hinder my ability?

I: uh uh

P: um, um. Oh shoot, I shouldn't let anything hinder my ability I: chuckles, P: to utilize it because I'm just using, I guess probably because we work in such a fast pace environment you're always trying to do more work with less people. Um sometimes learning something new slows you down and that would probably something, that you shouldn't allow it to happen but it would push new learning to the wayside and go back to your old way of doing things because it's faster.

I: laughing, chuckle.

P: Not to say the new way wouldn't be faster, but initially it may not be, so if it is something you can truly utilize and you're just swamped you don't take the time.

I: Alright. Is there anything else that influences whether or not you use the skills that have been taught um back in the workplace?

P: Well, sure you know whether or not you believe in them… chuckle. Just because I've been taught something, doesn't mean that I think it's good. Laughing, um um... and especially like I've been around it for a long time and I've been to a lot of management leadership type workshops …

I: um um…huh hu…

P: and um, I have learned a lot of good skills over the years from going to classes and my own mentors and in my workplaces and you will sometimes attend something and say um… ha, I think my way's better than that. (both chuckling), you know, and you know, generally people don't doubt themselves too much if you think your systems working you go through with it. And if you haven't seen enough in the classroom environment to convince you that this new approach might be better, different, good, or whatever than you probably won't use it.

I: Alright. Um when you think just of transferring in general and again especially when you say you have been around you've been through a variety of classes, I'm sure a variety of organizations, are there any other suggestions or recommendations you have that would help supervisors in general in implementing the leadership skills that have been taught?

P: Oh, that's a many faceted question. Um it's so dependent on how long you've been around, a new supervisor um is trying so hard to just learn their job that they don't necessarily pay attention to you know I: chuckles, P: management skills that need to pick up. Someone who's been here for a while, or um, maybe too long (both chuckle) gets a little set in their own ways…chuckles… it's probably that middle of the road group of supervisors who are um… know their job but are really trying to develop their personal skills as a supervisor that will get the most out of these management educational classes. Um what would help people I guess probably the best thing I would suggest is really really showing how in the classroom environment how this can apply to your… to my current position and what I do now. And that can be difficult, like for instance the last management training class that I attended was over in Lafayette, and it was the STARS class.

I: um um

P: Well you know 75 or 85 percent of the people in that STARS class were in donor care, I'm in donor recruitment so a lot of the examples that were used were relevant to the

donor care department and that would totally make sense, but it wasn't necessarily something that I could apply um because I've been here for a while could think of ways, that. OK I could probably try doing this here in this type of environment. But somebody who's not as seasoned a supervisor might struggle with how can I relate it to what I do, not what somebody else does in their department. You know to make it a little more tangible for them…Does that make sense?

I: Yes, it does, now do you have any examples of um…

P: Oh boy

I: of ways we might be able to make it more tangible?

P: I'm not sure, um. You'd almost have to either break down training classes individually to an environment that was solely one group that all kind of did the same type of work which is almost impossible to do, or, or try to…um, I'm thinking as I go, or try to come up with um. situational scenarios that you would do with groups in the classroom to make it.um easy for someone to see it. Like, for instances there were several times where they broke us up into little groups just to work on things but you were always in a group of people from other departments and I get that it's important to do that but at the same time if you really want me to retain what I learned then take it back to my job I need to talk to people who are savvy about my job. You know what I mean…chuckles

I: huh hu

P: Because I can, I can practice a skill on somebody from hospital services but they don't really know what I do and how my job works so they are just…oh, that sounded pretty good, you know, chuckles whereas if I…if I took it to one of my donor reps and said, here I'm going to try this with you, I'm going to trying doing it this way, I'm going to get a whole different feedback from them because they do know what we're trying to work on and what we're trying to do. Does that make sense?

I: yeah, it does, and you know, as I'm thinking through what you're saying and uh it would definitely be a challenge, but part of it is coming up with ways, with some ways or ideas where we could potentially do that.

P: uh uh uh uh Sharon, hold on one second

I: Sure, um… Now in what if any um does your immediate supervisor play a role in whether or not you use the skills?

P: oh, um. Very limited. My immediate supervisor is, is not all that familiar with my department um so in like just management skills um she's probably more involved but actual, you know skills I would use in my department no so much. We're not in the same building, when you're a little removed from somebody you just physically don't see them that often, so you don't have that much interaction.

I: And how do you feel about that?

P" Well there's always drawbacks to not being in the same building because, because you don't have that interaction…chuckles…um it's hard to have someone be your boss who doesn't know your job, because it's difficult for them to relate to it, you know, they try, and my managers tries very hard but it, it's just hard. You know, so it's not ideal um but sometimes, you know we are products of necessity and that's the way that it falls here where I'm located.

Overwhelmed with her own work load um that, you know it's again, I'm not knocking her at all, she's a good person it's almost impossible to get to work with someone else on their learning and their skills when you are so overwhelmed and have to do their own job you know.

I: Yeah, is there anything else that you can think of that you would like to add before we end?

P: As far as talking about transferring of learning what I picked up my in seminars and or classes to job?

I: Right, basically um, helped you and or other supervisors eh, to be able to take that information that is learned, and again, leadership development is mostly the management and if not, you know this is soft skills. But that would help people be able to more easily or more readily transfer those skills back to the job?

P: Um, probably the biggest thing is people a chance to do it… I don't know…you know what it's like we're so, we're so overwhelmed with our work just, you just have to put things on the back burner that don't have to be done right now, and as I was saying earlier sometimes a new technique or a new idea that you want to try out just gets kind of pushed away because you just don't have time. You know I don't know if everybody is this way but when somebody gives me a new way of dealing with a ..I don't know…a problem with one of your employees um, they are always tricky things to work with and I've to a management training class and they've tried to give me some ideas on how to deal with difficult situations and I want to try them but I need to practice that um..so if I'm really busy and tied up I don't, I don't take the time or make the time to practice that. I don't want to just try something out on somebody (both chuckle) without having had rehearsed it out a little bit myself and then OK, how will I approach this with this particular person. Um you end up not doing it because you're just jumping from here to here to here. So, I would say, um… don't make us so frantic in our own work that we can't take the time to get better, because you do revert to what's quick and easy when you need to.

I: ah huh,

P: And where is that line in the sand, I have no idea.

I: chuckles. Is there anything else that I should have asked that I didn't?

P: I don't think so. I thought your questions were thought provoking. They made me kind of sit back and think about the last class I was in and what did I pull out of it and how much have I used. (Both chuckle)

I: Well, and like you said… (Tape stopped)