
**IMPROVING THE TRANSFER OF TRAINING:
AN ANALYSIS OF A MEXICAN BI-CULTURAL SCHOOL**

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Summary

An institutions ability to transfer training to the workplace is important for its development. However, relatively little research has been documented in this field in regard to educational institutions. In this article, the transfer of training is discussed in relation to an international school based in Mexico City. Environmental and personal variables that may affect training transfer are identified and applied to the school's recent training practice. The current situation is analyzed and suggestions on how to improve the transfer of training in the future are proposed.

Introduction

The transfer of training is described by Holton et al (1997 in Kim, 2004:497) as “the degree to which trainees apply to their jobs the knowledge, skills, behaviors and attitudes they gained in training”. This process of carrying over newly acquired traits into the workplace is important because from an organizational standpoint “it is the application of learning rather than learning itself which makes the difference” (Prest, 2007:5). Within most organizations there are both the potential to place barriers against the application of learning and opportunities to assist the process. It is therefore, believed that having a clear idea of how to enhance the variables which assist transfer and the ability to develop strategies to negate those which are detrimental may, then be considered to be vital to an organization’s development.

Research Context

When discussing the transfer of training, recommendations will be based around the training experiences of an international

school based in Mexico City. The school educates children from the ages of four to eighteen. Throughout this paper the school will be referred to as ‘the school’. The teaching staff is an approximately equal mix of Mexicans and western (usually, but not exclusively, British) staff. The senior management team (SMT) consists of ten members all with different job roles, but with joint responsibility for the staffs professional development. The focus of the discussion below will be based on how the SMT can facilitate the improvement of the transfer of training amongst the pedagogical staff.

An educational organization was chosen for several reasons; at the time of writing this paper, the school was going through significant changes in the way it operated; the curriculum was being redesigned and the way management would like teachers to plan and deliver lessons was overhauled requiring all teachers to go through a training program in these new techniques. This experience therefore, gives recent, relevant indicators of how training is conducted in the school and provides opportunities to suggest how the process could be improved in future. A further reason was that while the private sector has been the focus of many related studies (e.g. Cheng and Ho, 1998; 2001; Lynch et al, 2006; Rowold, 2007), comparatively few studies have concentrated on educational institutions. For educational institutions to take full advantage of the ever-increasing resource opportunities, technological advances and pedagogical strategies, they must improve the transfer of training to the classroom that staff have received in these areas.

Two main themes that have been the focus of previous transfer of training research

(Awoniyi et al, 2002; Gaudine and Saks, 2004; Pidd, 2004), will be the theoretical lenses through which the school's experiences are analyzed. They are environment, trainee encounters before, during and after any training and the variables associated with the trainees' perceptions about the training process. As the objective is to suggest ways in which the above organization can improve transfer of training, the focus will predominantly be on the positive aspects of each of these themes. First, before analyzing how the trainees environmental situation interacts with training transfer, the personal variables that play a prominent role and how they could be affected in order to facilitate the improvement of training transfer will be presented.

Personal Factors that Affect Transfer of Training

Chiaburu and Marinova (2005) conclude that personal factors are very important in determining the level of training transfer. One of the main personal characteristics that affect training is motivation. It has, at all stages of the process, been shown to be the major determinant of the level to which training is successfully transferred to the workplace (Cheng and Ho, 1998; Derouin et al, 2004; Seyler et al, 1998). However, motivation has also been shown to be determined by several other variables that independently affect training transfer. For example, in their study of MBA students, Cheng and Ho (2001) concluded that job involvement and career commitment concurrently affected training motivation levels and the quality of transfer. While motivation is a difficult variable to measure, both job involvement and career commitment are more tangible. Therefore,

they will be combined to create one of the variables discussed below. Another will be the perceived value of training, identified by Belling et al (2003) as one of the prime determinants of motivation and, therefore, transfer. However, before moving to these two factors, the variable many researchers (Chiaburu and Marinova, 2005; Gaudine and Saks, 2004; Machin and Fogarty, 2004) see as the most significant in predicting transfer, training self-efficacy, will now be discussed.

Self-Efficacy

Self-efficacy, defined as individuals belief that one can successfully meet training requirements and master training program contents" (Tziner et al, 2002:168), is a major factor in the transfer of training. When Machin and Fogarty (2004) analyzed the variables controlling pre-training motivation to train, the major determinant of motivation levels was self-efficacy. In their study of industrial trainees, Tziner et al (2002) also found that higher self-efficacy levels were positively correlated with higher effort levels. It could, therefore, be suggested that if trainees are more motivated to train and are trying harder to complete training to a high standard, they are also more likely to subsequently try to use the training in their work, and thus the transfer of training is likely to be better.

If self-efficacy does increase trainees likelihood of persisting, mastering and performing complex skills on the job" (Gaudine and Saks, 2004:60) then it could be suggested that this characteristic should be tested before training is assigned. Questionnaires are commonly used to test for self-efficacy (Gaudine and Saks, 2004; Gist et al, 1991; Tai, 2006) and could be

easily administered among the staff at the school. Once those with high efficacy levels are identified, it would be reasonable to argue that they should be the first to receive any intended training. Although those with high efficacy levels are also likely to be working at a higher level due to the virtuous cycle of training, efficacy and transfer identified by Gaudine and Saks (2004), if they completed training and appropriately transferred this back to the workplace, they would become role models for other staff members. Those employees would then become more confident about their own training potential and the virtuous cycle mentioned above would be disseminated throughout the staff.

Perceived Value of Training

In their study of training line managers in the manufacturing sector, Lynch et al (2006:20) found that learning and its transfer to the workplace was easy “if people were ‘on board’ and ‘not cynical’”. This is supported by Santos and Stuart (2003:42) who claim that, from the beginning, an organization “should ensure that any training provided is perceived to be of worth”. It could, therefore, also be suggested that apart from self-efficacy, perceptions of the training’s value should be determined. Those who believe it to be of value, would be the people who are more likely to transfer the learning to their work practices. And thereby, begin the aforementioned virtuous cycle of learning.

Career Commitment and Job Involvement

Cheng and Ho (1998) found that, among MBA students in Hong Kong, career commitment was a significant variable in their motivation. Motivation, as has already

been stated, is linked to transfer of training. They found similar results in a later study using a similar sample group. Job involvement was the other significant variable in their studies. Though strictly an environmental factor, involvement is most probably determined by commitment and job satisfaction. This intrinsic characteristic has also been found to be a significant determinant of training transfer, with those more satisfied with their job being more likely to effectively use learning in the workplace (Belling et al, 2003). Therefore, indicators of these three factors should also be included in the questionnaire completed by staff prior to training allocation. Those who score high on these variables, as well as those mentioned before, should be given the first opportunities to train.

Environmental Factors that Affect Transfer

Although the personal elements shown above could ultimately be seen as the deciding factors regarding training transfer, organizational culture reflects the essence of the organization and provides the context in which thoughts, behaviors and attitudes are developed. Therefore, if an organization wishes to positively affect transfer of training; it must concentrate on creating an appropriate professional context. Elements that create a conducive environment before, during and after training will now be discussed along with how the school can move from its present situation towards achieving this.

Pre-Training

Awoniyi et al (2002) concluded that congruence between the trainees ideals and the training situation, what they called ‘person-environment fit’, had a significant

effect on the transfer of training. This is supported by Santos and Stuart (2003:43) who conclude that “enrolling employees to attend programs in a non-supportive environment may waste funds”. Recently, at the school, all the staff was required to attend training program on a new style of curriculum. This was implemented by different providers in a variety of locations all of which had not been inspected by SMT. It could be suggested that one way in which the school could improve the transfer of training is, next time, by the SMT first attending different provider locations for the course, evaluating the teaching style at each one and assigning employees to courses which best suited their learning style preferences. Though this appears to be an inefficient method, no time or resources are wasted as SMT is required to attend many of the training courses for the school to be accredited by curriculum administrators.

The demographic profile of the staff has been mentioned above. Due to the international nature of the programs that the school wishes to follow, many of the training courses recently attended by both Mexican and overseas staff have been held in a different country. Sarpong and Rawls (1976) believe that transferring from the training course to the workplace, already a difficult task, is made more complex with the added variable of cultural differences between the two country situations. Although their study concentrated on transferring skills gained in a developed country into a less developed country’s work environment, which included a technological and economical gap that does not feature in the schools experience, the conclusion regarding culturally bound training is still salient. It could be

hypothesized that transfer of training would be improved in the school if courses could be found within Mexico instead of abroad, and preferably in the trainees mother tongue as language often holds many cultural references.

Tai (2006) concluded from his analysis of questionnaires completed by trainees on a computer software training course that when managers provide information about the program before it starts, transfer of training is improved. Preparation time and appropriate information before a course begins would give the employee the opportunity to devise adequate strategies to complete the course content. With these strategies in place, the employee is more likely to have good self-efficacy levels, which has been shown in a preceding section to positively affect transfer. In his study of outsourced training programs for Bhutanese workers, Sofo (2007:119) claims that “the lack of documentation of training objectives [prior to training] resulted in poor focus and motivation of the trainees to learn and transfer”. The SMT at the school has, in the past, informed the staff about training dates and the objectives of the course, but has provided little information regarding the actual content and activities that were to be utilized. The authors believe that by providing such information the school would improve the transfer of training.

Peer support, in particular, positive reinforcement from peers, has been shown to have a positive effect on pre-training motivation (Machin and Fogarty, 2004). It has also been shown to reduce feelings of uncertainty and insecurity caused within work (Vuorinen et al, 2000). At the moment, peer support within the school is not formalized. However, the authors believe

that if an official ‘buddy scheme’ were introduced, where an employee who has been on the training program, was assigned to support or mentor a staff member about to attend the course, the transfer of training for both members of the partnership would increase. The newer member of staff could have questions answered and with the increase in knowledge, as mentioned above, an increase in efficacy and transfer would ensue. This would also benefit the more experienced member of staff, who would have the opportunity to reinforce their knowledge and would, therefore, also increase their own confidence levels and transfer. This two way support could be extended into a multi-person network. Within this network, staff could “discuss how they obtained resources needed to use training content or how they coped with a work environment that interfered with use of training content” (Noe, 1998:121). All of these communications would help increase efficacy and as a consequence, training transfer.

Another type of support the organization could provide is manager or supervisory support. Noe (1998) describes six different levels at which a manager could support a trainee. As several of these levels were present in the school during the latest training program they will not be commented upon. However, one level pertinent to pre-training, namely reinforcement, was not evident. This strategy involves the manager discussing progress with the trainee. A program of creating action plans, a record that documents the objectives of trainees learning and schedules meetings between them and a member of the SMT, could be used. They would provide much needed structure and also oblige the SMT to provide

more support to those lower down the school.

During Training

In the preceding section, we looked at how best to prepare trainees before they attend a course. However, even the best preparations are wasted if the course itself is not appropriate. At the time of writing this paper, the school was sending all staff to several outsourced training programs and was supplementing this with a series of on-site training courses led by a combination of outside speakers and members of SMT. Though these sessions do complement each other, there are several ways in which the environment during training could be improved.

One of the significant findings in Awoniyi et al (2002) was the correlation between workload and transfer of training. The lower the workload, the higher will be the transfer. In his study of Sri Lankan industrial workers Wickramasinghe (2006:243) found that “skills that were not learned during training could be connected to insufficient time for participants to gain confidence in using the skills”. Obviously, if a skill is not learned in training it cannot be transferred to the workplace and the training opportunity will have been wasted. Both these studies are corroborated by Lynch et al (2006:19) who found that “transfer was difficult due to time and workload issues”. At the time of writing the school did provide time off from classes for those on training courses, but required the teacher to provide all the plans and resources for the lessons they missed and to mark the work completed in their absence. Therefore, their workload was actually increased by attending training. The

above research would, therefore, suggest that the SMT should ensure lessons coverage is planned and resourced to somebody else and that the teacher does not have to grade the work done in their absence. This would lighten the workload and provide extra time to concentrate on the training which would in turn, lead to improved transfer of skills into the workplace.

One of Noe's (1998) levels of management support for training is participation. In the description of this level, Noe suggests that managers should take part in training programs alongside the trainees. When looking at the transfer of training among a group of junior managers Lynch et al (2006:20) conclude that "the fact that two senior managers from the site were at the training was regarded as positive and helpful". Therefore, where possible, a member of the SMT should accompany trainees on future courses. This appears to contradict a previous suggestion for improvement, namely that the SMT attend courses *before* trainees. However, due to the high number of the SMT members, both the suggestions could feasibly be executed without overlap and inefficiency.

After Training

Once training has been adequately prepared and competently administered, transfer of that training to the workplace will only occur if a positive climate for transfer is established. Santos et al (2003:42) found that transfer was "conditional on the opportunities and resources available to use new knowledge and skills". This is supported by Noe (1998:123) who states that "trainees who are given opportunities to use training

content on the job are more likely to maintain learned capabilities than trainees given few opportunities". During the latest training process at the school, little was done to ensure that this occurred. Training for teachers, usually, involves classroom strategies. These are easily overlooked once back in the classroom, especially when, as has been the case in the school so far, there is no system of regular and frequent observation of lessons to evaluate the use of newly learned techniques. Therefore, one way to improve the transfer of training in the school would be to schedule and prioritize a series of post-training observations by both peers and the SMT.

Burke and Baldwin (2003:227) suggest that "a substantial part of an organization's investment is often wasted due to trainee relapse". This is empirically supported by Baldwin and Ford (1988 in Awoniyi et al, 2002) who found a lower transfer of training rate the farther away from the event the trainee became. Relapse prevention and transfer enhancement are two strategies that would reduce the effects of relapse and should be at the heart of any post-training analysis or monitoring the school performs. A lapse by a trainee is when they revert back to previous, pre-training, behavior types. A relapse is where this happens a subsequent time. Relapse prevention is a cognitive strategy where trainees learn to identify high risk situations and design coping strategies which allow them to maintain the newly learned behavior and not revert to previous actions. The ultimate goal is to increase trainees self-efficacy in identifying these situations so that they are mentally prepared when the situations are encountered. Gaudine and Saks (2004) found that by including a

relapse prevention module in a training program for soldiers, they increased the amount of training that was remembered. A similar module could be part of the school's training policy. If the program is outsourced, then it would be the responsibility of the SMT to provide this extra session once the teacher is back at school.

Conclusion

Transfer of training, the crossover of skills and knowledge learned in training to the workplace, has been shown to be of great importance to both individuals and organizations. Those who can successfully manage this process will continue to develop professionally and will be an asset to their organization. In the case of the school, those who transfer training are likely to have better classroom management, teaching strategies and more appropriate plans. This, in theory, would lead to more achieving students and a better reputation for both teacher and school.

The above discussion concentrated on showing how the transfer of training could be improved in the organizational context of a bi-cultural school in Mexico using a recent, school-wide training experience as its baseline. The personal factors and the environmental variables before, during and after training that could affect transfer of learning into the workplace were focused upon.

The proposals put forward as ways to improve the transfer of training in the school were as follows. Before training takes place the SMT should attend the programs at different sites in order to match

specific teachers with certain learning styles with certain locations and courses. Initially, offering training opportunities only to those with high training efficacy, job satisfaction and commitment was suggested in order to initiate a virtuous cycle of training motivation. Levels of these characteristics would be determined using a questionnaire. It was also suggested that the institution provide a genuine lessening of the trainees workload during the training and the transfer process in order to allow them to concentrate fully on their learning. The idea of providing relapse prevention sessions to aid training retention was put forward and a peer network to create a supportive atmosphere was proposed.

If the schools were to adopt the strategies suggested above, they could reasonably expect transfer of training to improve. Upon this improvement, they would also see a rise in organizational performance, for, as Lynch et al (2006:22) conclude, transfer of training “moves beyond individual development to bring organizational gains”.

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