

## Transfer of Learning

When we put on any sort of training, we do so with a specific purpose: to create change in someone's performance and/or knowledge. In order to create the desired change, we need to think ahead and *plan* the transfer pr

There are five core assumptions that Holton & Baldwin (2003) state are important when it comes to transfer of learning:

1. Transfer is a function of a system of influences, not just learning design.  
*Consider the entire system.*
2. Transfer is not necessarily resistant to intervention.  
*Don't leave transfer to chance... plan.*
3. Achieving transfer does not require substantially new processes and systems.  
*Build upon what already exists and matters.*
4. Transfer interventions will be most successful where the explicit goal is performance improvement.  
*Fully understand what the true goal is and focus this goal on performance improvement.*
5. Transfer is multidimensional.  
*Many factors are involved; know what these are and how they are affected by your continuing education session.*

1

2

3

4

5



## Transfer Strategies

Transfer strategies and interventions can (and should) be employed before, during, and after an educational intervention. A transfer of learning plan will enable you (the instructional designer) to demonstrate intended outcomes resulting from the continuing education session you are proposing. This will also demonstrate the fact that you are not leaving transfer to chance, reducing concerns about how your continuing education will be utilized.

As you can see from the *Conceptual Framework for Managing Learning Transfer Systems*<sup>1</sup> model above, there are many elements that are involved when we speak of transfer. All of these may not be influenced directly by your actions, but each need to be taken into consideration in order to assure the most transfer possible. To do this, Caffarella<sup>2</sup> proposes some strategies we can employ before, during, and after the continuing education and does so specifically for three target audiences: (a) the program planners, (b) the instructors/facilitators, and (c) the learners:

### Program Planners

Before	During	After
<ul style="list-style-type: none"> <li>• Identify what needs to be transferred</li> <li>• Ascertain contextual factors where the learning is to be used</li> <li>• Set guidelines to determine success</li> </ul>	<ul style="list-style-type: none"> <li>• Involve stakeholders key to learning transfer in program implementation</li> <li>• Monitor instructors to ensure they use instructional techniques addressing transfer</li> <li>• Use formative evaluations</li> <li>• Provide alternative instructional techniques for multiple learning preferences</li> <li>• Provide a plan for instructors to teach about transfer</li> </ul>	<ul style="list-style-type: none"> <li>• Initiate and support follow-up learning</li> <li>• Develop different transfer techniques based on learner and organizational needs</li> <li>• Negotiate and change what the learning transfer can realistically encompass</li> </ul>

<sup>1</sup> Holton, E. F., & Baldwin, T. T. (2003). *Improving learning transfer in organizations*. San Francisco: Jossey-Bass.

<sup>2</sup> Caffarella, R. S. (2002). *Planning programs for adult learners: A practical guide for educators, trainers, and staff developers*. San Francisco: Jossey-Bass.

*Instructors/Facilitators*

Before	During	After
<ul style="list-style-type: none"> <li>• Obtain a clear picture of what learning is to be transferred</li> <li>• Ask specific questions about the contextual aspects of where the learning is to be applied</li> <li>• Ask learners to select projects or activities that encompass what learning is expected to be transferred</li> </ul>	<ul style="list-style-type: none"> <li>• Use active teaching techniques</li> <li>• Incorporate the learners' context as part of the learning environment</li> <li>• Provide job aids and suggest other transfer resources</li> <li>• Assist learners in developing specific application plans</li> <li>• Teach learners about different transfer strategies and how to select the best one for their situation</li> </ul>	<ul style="list-style-type: none"> <li>• Provide follow-up assistance through a variety of techniques</li> <li>• Facilitate the process of applying different techniques and provide support of these efforts</li> <li>• Provide feedback to program planners, learners, and other stakeholders on what learning can realistically be transferred</li> </ul>

*Learners*

Before	During	After
<ul style="list-style-type: none"> <li>• Clarify what the expectations are for learning they should transfer into their situation</li> <li>• Select specific things they believe they can change</li> <li>• Discuss with key stakeholders who could assist learners with application</li> </ul>	<ul style="list-style-type: none"> <li>• Actively prepare for participating in learning</li> <li>• Try what is being learned in the setting in which it is to be transferred</li> <li>• Use job aids provided and give feedback to the instructors or program planners</li> <li>• Develop specific plans to assist in learning transfer</li> <li>• Select learning strategies that will help in applying what was learned</li> </ul>	<ul style="list-style-type: none"> <li>• Implement application plans and be willing to change those plans</li> <li>• Initiate different transfer techniques</li> <li>• Adapt what learning can and/or should be transferred based on experience</li> </ul>

## **Techniques to Facilitate Learning Transfer**

### Individual techniques

- Individual learning plans
- Coaching
- Job rotation or guided internships
- Mentoring
- One-legged conferences
- Job aids
- Portfolios
- Application notebooks

#### Group techniques

- Transfer teams
- Tuning protocols
- Support groups
- Follow-up sessions

#### Individual or Group techniques

- Networking
- Action research
- Reflective practice
- Chat rooms

## Transfer Strategy

Using the following template, identify any elements that enhance or inhibit transfer of learning:

Factor	Things that Enhance or Inhibit	People who Did or Can Assist in Transfer
Learner or team: <ul style="list-style-type: none"> <li>• Ability</li> <li>• Motivation</li> <li>• Individual differences</li> <li>• Prior experiences</li> </ul>		
Organization: <ul style="list-style-type: none"> <li>• Preconditions</li> <li>• Supports</li> </ul> <i>Before and after</i>		
Learner or team interventions: <ul style="list-style-type: none"> <li>• Preparation</li> <li>• Maintenance</li> </ul> <i>Before and after</i>		

Factor	Things that Enhance or Inhibit	People who Did or Can Assist in Transfer
Learning event: <ul style="list-style-type: none"> <li>• Content</li> <li>• Design</li> </ul>		
Individual or team performance: <ul style="list-style-type: none"> <li>• Near transfer</li> <li>• Far transfer</li> </ul>		

Now, identify the strategies you plan to employ and provide a rationale for that strategy