EXPLORING BEST FACILITATION STRATEGIES

TO ENCOURAGE THE TRANSFER OF LEARNING

WITHIN A HEALTH-CARE ENVIRONMENT

THESIS

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BY

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ABSTRACT

The purpose of this study was to incorporate good practice facilitation skills in an adult education context to explore the links among the facilitator, the learner, and the environment, and to achieve transfer of learning. A review of the literature revealed that most strategies used to encourage transfer of learning were based on experiences in formal adult education classrooms. In this study, transfer of learning strategies were adapted to a short-term educational intervention, and then evaluated using appropriate methods of data collection: pre-session questionnaire, post-session questionnaire, and a 3-month follow-up interview. The recommendations from the study consist of a set of conditions and strategies for adult educators to enhance transfer of learning when developing short-term educational interventions like in-service sessions.

ACKNOWLEDGEMENTS

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CHAPTER 1

INTRODUCTION

The Canadian economy of the early 21st century continues to put competing

priorities on how money is spent in both the private and public sector. Consequently,

employers are becoming more selective about the type and frequency of training they will

sponsor for their staff. Employers are seeking accountability from adult educators prior to

their interventions, requesting examples of how learning objectives will address work

place tasks, and how productivity will be increased as a consequence of teaching.

Employers are also asking for greater and greater levels of cost effectiveness. For

contracted adult educators, these issues lead to the re-examination of measurement and

accountability in the learning environment. Evaluation and delivery methods need to

include ways of examining and influencing variables such as the needs of employers,

employees, and the work place.

In the adult education literature, one aspect of this accountability is referred to as

transfer of training, transfer of learning, or application of learning. Various strategies are

recommended by Brookfield (1986, 1987, 1999), Caffarella (1994), Farquharson (1995),

Fox (1994), Zemke and Gunkler (1985), and Wlodkowski (1999) to increase transfer of

learning knowledge and skills learned within the formal educational setting to the work

place. This thesis describes and applies some of these strategies as delivered via in-

service sessions in health-care facilities. The goal of my study was to confirm that

transfer of learning strategies and the use of good instructional methods taken from

formal educational settings can be successfully applied to short-term teaching episodes,

such as in-service sessions , in order to transfer the use of soft skills to the work place. In

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addition, the thesis was conducted to examine some of the limitations, strengths, and

possibilities for applying these strategies in similar practice settings.

Background to the Problem

Work place education is intended to improve employees' abilities to perform their

duties in the work place. Some of these duties are defined as skills that can be

demonstrated and taught. Having worked as a professional in both the private and public

sector for 20 years, I have observed that there is a lack of connection between learning

and the work place environment. Campbell and Cheek (1989) call this "encapsulation"

(p. 32) the failure of the learner to implement, in the work place, what was learned in an

educational session. The issue of the lack of transfer of learning has seemed to me to be

one of the most central issues for health-care educators today.

As a facilitator who implements adult education interventions in the work place, I

recognize encapsulation, or the inability to transfer new learning to the work place, as an

issue. I also realize that, as a learner, I have experienced encapsulation in a variety of my

own learning experiences. Therefore, as a facilitator in the long-term health-care context,

I believe it is essential to be aware of, and understand, the processes and

interrelationships of the variables that result in a lack of transfer of learning.

Two other issues involved are controversy regarding when and where to use

transfer of learning strategies, and how to deal with the variables that affect transfer of

learning outside of the learning environment. Caffarella (1994) says that workshops,

retreats, and lecture series are examples of educational programs in which adult educators

do not need to plan for transfer of learning. For her, only formal educational programs

lend themselves to the evaluation of concrete results. Caffarella believes that "assisting people to make changes [in formal settings] is what transfer of learning is all about" (p. 108). Many authors (e.g., Brookfield, 1986; Knowles, 1975; Mezirow, 1990; Wlodkowski, 1999) believe that change is what all learning seeks to achieve, and what all learning consists of, and it is not attributed to one concept like transfer of learning. These authors do not identify transfer of learning as a separate concept; they include the idea as part of the learning and evaluation process. These same authors also view variables outside the learning environment, such as political influence and management priorities, as issues that affect learning and therefore need to be considered in educational planning. These authors do not address these external variables solely in the context of transfer of learning. Caffarella identifies variables outside the classroom as being important because, without cooperation from all those involved in the learning process, there is "a documented decrease in learning that transfers" (p. 109) to the work world.

Another component to the background of the problem is incorporation of my learning goals. In the exploration of transfer of learning and instructional methods, it was my intention to: challenge my own didactic teaching style, develop an understanding of current practices and models of facilitation, develop a congruent teaching style that is sensitive to the learner as a whole, attempt to experience an attitude shift towards guiding learning and not leading, and increase my research skills.

Problem for the Study

As an adult educator, in a mid-sized Canadian town, I often am contracted to teach specific content or skills to learners in an allotted time, place, and date within a health-care facility. Through my contractual agreements, I began to realize that managers

in these facilities would confidently express the needs of their employees and indicate risks that they were taking as employers or managers in the facility in providing in-service sessions. These same individuals stressed the issues of accountability and productivity. Generally, they did not support their employees in taking risks, nor did they see the need to ask employees what type of problems, learning, or information they needed. As an adult educator entering a health-care facility as an external expert. I found myself assuming many things about my potential learners, what I had to offer, and the best way to facilitate learning. Because of my own 10 years of experience within health-care settings and my reading in adult education, I wondered whether the learners would learn best if: (a) the in-service sessions were relevant to their felt needs, (b) they were treated with respect and asked for their opinions, (c) they had the opportunity to incorporate past experience into their learning, and (d) they had a sense of where the learning was leading them. Thus, I was limited in my abilities to understand how learning occurs in the work place.

This limitation restricted my ability to conduct a needs assessment and my confidence in the learning strategies that I might use to increase transfer of learning to the work place. I felt dissatisfied packaging each program as an isolated learning situation within a controlled, short-term context. I wanted to know whether my instructional methods and specific transfer of learning strategies were useful in promoting transfer of learning, whether the methods I chose made a difference during the in-service sessions, and whether the learners used their learning in the work place after the in-service session. The problem was to isolate the impact of my participation in the educational process. I recognized that the adult educator is only one variable in the process and that, as an

external facilitator, I would have to work within the employer's parameters. I also realized that my situation was typical of many in-service session programs. Although transfer of learning has recently become a topic of interest and controversy for work place educators, limited adult education literature is available on the variables and strategies that are most effective in increasing transfer of learning.

This thesis explores the use of strategies that encourage transfer of learning in an adult education intervention; namely, a series of in-service sessions. Its goal is to discover if my transfer of learning strategies worked, if my implementation of specific instructional methods made a difference during the in-service session; and whether the learners used the information after the intervention.

Purpose of the Study

The purpose of this study was to use and assess the value of selected "good practice" (O'Neil, Foy, & Cuozzo 1995) facilitation skills and methods in an adult education context. I wanted to further understand the links among the facilitator, the learner, the environment, and transfer of learning. The transfer of learning of content was taught by using selected teaching methods and transfer of learning strategies found in adult education literature. My second objective was to see if these methods and strategies would promote critical thinking and enhance reflection among the learners during the in-service sessions, at work, or at home. Finally, I sought to assess which of these selected methods and strategies was most effective for the field and for my own practice

Scope and Limitations

This thesis is in the area of facilitation of transfer of learning within the context of

long-term health-care facilities in a western town with a population of approximately

75,000. The study aspect is the development of facilitation skills emphasizing

instructional methods and specific transfer of learning strategies.

The process was delivered through 12 one-hour in-service sessions within a

structured work environment where regular educational in-service sessions were already

a feature. Twelve, rather than 9, sessions were delivered because one of the directors of

care asked me to repeat the sessions in order to maximize the number of her staff that

could attend. Each of the three facilities selected learners in accordance with their usual

practice for in-service sessions. I did not want their present selection or attendance

procedures to change because I was presenting information. Typical of their work place

in-service sessions, they expected a didactic presentation style; however, I used adult

education instructional methods and structured the sessions with the intent of increasing

the degree of participants' control, interactive participation, and individualized learning.

The parameters that define the background to the identified problem are as

follows: my contracts are 1 to 3 hours in duration, in one to three session blocks. The

learners are employees of a health-care facility representing all departments and

management levels. The content is "soft skill" skills. As Georges (1988) points out, it is

difficult for participants to take and use soft-skill information back to their work place:

"We're lucky if 20% go back to the job and use the techniques we taught them. The other

80% may try out their new skills a few times, but they quickly revert to their old patterns"

(p. 43). This statement exemplifies the restriction of conducting the in-service sessions

during a designated time slot of 1 hour. For some employees these in-service sessions represent some of their limited professional development time. As the facilitator, I am rarely given demographic descriptions or the opportunity to meet with the learners prior to the in-service session. Numbers participating in the sessions vary from 10 to 50. Despite these limitations, contractors generally request clearly defined, observable interventions that will result in an increase in work performance.

I adhered to a time schedule that I presented in the form of an outline at the beginning of the in-service session. I used the first 10 minutes to establish rapport, review the outline, and introduce the content. The following 15 minutes were used to present the content. The next 25 minutes were set aside for a small group activity and debriefing. The final 10 minutes were used for review, questions, explanation of my study, distribution of the transfer of learning exercise, concluding remarks, and distribution of the end-of-session evaluation forms.

The topics chosen for the content section were problem solving, motivation, and caring. Each one of these content areas is defined as soft skills in the literature (Georges, 1988). Soft skills were chosen for two reasons: first, because of the relevance of each of these topics to the learners involved, and, second, to challenge the controversial issue of whether soft skills can be taught and transferred as a skill. Georges believes that because soft skills are "people skills," they are not as tangible and cannot be measured. Therefore, soft skills cannot be taught, only treated as shared knowledge. There cannot be an expectation of transfer of learning outside the educational environment, from this training perspective.

My premise, however, was that, because the content of problem solving, motivation, and caring is relevant to the learners, it can be combined with transfer of learning strategies and good instructional methods from the literature of adult education, and can be taught in a short period of time. The most important variable in this premise is relevance, as supported by Wlodkowski (1999). He believes that if relevance is not present then learning does not evoke meaning for the learners. The learning has to be "connected to who they are, what they care about, and how they perceive and know" (p. 74). Other factors in the learning environment are also necessary, like use of good instructional methods; however,

> a challenging learning experience in an engaging format about a relevant topic is intrinsically motivating because it increases the range of conscious connections to those interests, applications, and purposes that are important to learners. (p. 75)

As stated earlier, Georges (1988) clearly makes the point that soft skills cannot be taught in short learning intervals. I disagree because I believe that the main factor is relevance, not time allotment. As a result of a well-planned and relevant educational intervention on soft skills, learners should experience an increase in self-confidence, enthusiasm, and commitment to self and work or both; an increased desire for cooperation with other staff; and should be able to recognize that their skills have developed.

My three-part, in-service sessions were offered to staff in three long-term health-care facilities during the day shift. Each facility had earlier achieved hospital accreditation, each was unionized, and each provided the same type of 24-hour care, with approximately the same complement of staff and residents. All three had similar philosophies, working conditions, and opportunities for educational in-service sessions.

There were 62 learners in total, as determined by attendance taken at the end of each session. Since some of the learners came to more than one session, there were 197 registrations in total. All but two of the learners were female. All departments and disciplines (e.g., laundry, housekeeping, personal-care staff, nurses, and management) were represented by at least one person at each in-service session.

The limitations are based on the factors within the defined learning environment and my life experiences. One of the limitations of this study involved the selection of participants, since not all learners had a choice to participate. As reported by the directors of care (DOC) from the three facilities, some employees were required to attend, whereas others had a choice. Specifically, the DOC of Facility A stated that she posted the information and let staff sign up as interested, and she also told some of her staff members that they had to attend. In Facility B, the DOC stated that she chose an entire shift and called them off the ward when the in-service session was occurring, and they did not have a choice. In Facility C, the DOC stated that she posted the information and left it unattended or monitored. She felt attendance of in-service sessions was the responsibility of her staff. My assumption that the lack of choice is a limitation comes from my reading in adult education which emphasizes the need to involve learners in the determination of needs and to allow for choice in attendance. If learners enter a learning environment negatively disposed it will affect their learning. Due to the fact that I had no contact with anyone in any of the facilities prior to the in-service sessions other than the directors of care, I was not able to get a sense of the learners' attitudes towards in-service sessions generally or mine specifically. I had to accept the comments from the directors

of care, that their staff were willing participants, and attendance or motivation would not be an issue.

A second limitation was that learners were informed of the in-service sessions only by a poster indicating the basic facts of time, date, location, topic, and sign-up procedure. There was no communication between the learners and myself, as facilitator, to discuss their needs or issues in advance regarding the educational opportunity. The director of care in each facility made the unilateral decisions regarding the content, dates, times, and structure for the in-service sessions. There was no form of needs assessment conducted. During my initial meeting with the directors of care, the information was presented and the directors made the decisions without staff input.

Another limitation was the designated time of day for the delivery of the in-service sessions. The scheduled times were 1 hour before lunch or at the end of the day shift. From my experience of having worked in similar facilities for 10 years, I knew that attending in-service sessions just before lunch was difficult because I was often hungry or preoccupied by work that needed to be done before lunch. Equally difficult were the in-service sessions at the end of the shift because staff members are trying to finish work before leaving for the day.

The in-service sessions took place in three locations, which had two significant limitations. The space was too small in each location. The limited space made it difficult to break up the larger group into smaller groups for group discussions and, since each room varied with each facility and I had more learners than space, I moved the furniture in such a fashion that each learner could see the front, and attempted to provide as much table space as possible for those learners who wanted to sit by a table. The second

physical limitation was that because there was no way to turn off the public address

system, we had constant interruptions during all of the sessions.

Another limitation was the request made by the director of care from Facility A to

add an extra series of presentations to allow more of her staff to attend. The consequence

of repeating the series in one facility was a higher response rate that affected the results.

My findings were further affected because no participants from Facility C chose to

participate in the follow-up interviews.

I had no indication from the directors of care as to staff morale, labour tensions

around the union negotiations going on at the same time, or other variables that could

affect the learning environment. I know from previous work experience that there is

always more tension between management and staff during contract negotiations, poorer

communication, and less cooperation. In situations where staff are not allowed the choice

to participate in in-service sessions, I have observed staff express animosity, resentment

about attending the sessions, and negative attitudes when entering the learning

environment. As it turned out in Facility A where the participants had opportunities from

which to choose and knew they were supported, I did not get the sense that staff morale

or labour tensions were present. However, I did get this sense from Facilities B and C.

Another limitation was my decision to deliver soft-skill content rather than hard

skills content. Georges (1988) adamantly separates hard skills (driving a truck) from soft

skills (leadership skills). He specifies the need for different delivery techniques, learning

environments, and follow-up or evaluation methods for hard and soft skills. Tallman and

Holt (1987) agree with Georges and also define two further barriers within the delivery of

adult education that are relevant to this situation. One of these is that not much attention

is given to what happens after an educational intervention. Typically, the focus is on what occurs during the program. Secondly,

> More often than not, programs tend to be crammed with content and allow little time for reflection, synthesis, or integration. This overload of information interferes with a participant's learning transfer and can be a cause of ineffective programs which result in very little performance change on the job. (p. 26.)

The second concern describes my project exactly; there was little time to actively experience, reflect, think critically, or incorporate past information with new in my one-hour time slot. These short duration in-service sessions also decreased the opportunity to interact with the learners on an individual basis. When I am facilitating educational interventions that are longer in duration. I am able to connect with the learners more personally. This rapport encourages more questions, dialogue, and reflection. Another limitation regarding the short duration of the in-service session was that there was no time to incorporate strategies to enhance memory or retention but they would have been helpful had I been able to include them.

Assumptions

The chosen content area, soft skills, has been referred to by Georges (1988) as "people skills" (p. 43). They are not as tangible, measurable, or objectified as the technical skills needed to write a procedures manual, for example. I assumed that using soft skills as content would enable me to assess (a) my teaching skills, (b) the documented strategies that increase transfer of learning, and (c) the assumptions in the literature regarding transfer of learning in the in-service session setting. I believed that learners would be able to articulate their successes and failures better during the follow-up interviews than if I had not used transfer of learning strategies or good instructional

methods. The post-session interviews were intended to explore and document transfer of learning from the perspective of the participant.

I assumed that, upon explaining the in-service session series and getting the directors of care to agree to it, I would experience their full cooperation and support. I assumed that the directors of care, as administrators, would inform all of their staff of the in-service sessions, answer questions, and encourage learners to attend, since they said they would. I assumed that employees would attend the in-service sessions with open minds, willing to learn, and be eager to participate. I assumed that the learners' interest would be sustained because the content presented would be stimulating and relevant to their work. I also assumed this interest would lead to learners agreeing to participate in the follow-up interviews.

Definition of Terms

For the purpose of this thesis, I have chosen the following definitions.

Critical thinking is an active process and not an outcome. An educational experience can trigger positive and negative results, and vary in relation to the context in which it occurs. Critical thinking consists of challenging one's assumptions or beliefs within a context, and then applying, or exploring, alternatives. In this study, I use the term in reference to the process of questioning one's actions and beliefs that leads to discussion, thought, and possibly a choice to act or believe differently.

Facilitator refers to an individual who defines the scope of the learning experience, creates a learning environment that stimulates the learners, provides the necessary resources, and helps the learners to assess their learning experience.

In-service session is a term used in the health-care system to define an educational intervention that employees attend. Often these interventions are at the work site, initiated by management, and compulsory.

Reflection is used to designate the process of thinking deeply and reminding oneself of past events, which may lead to ideas, discussions, solutions to problems, decisions, or actions.

Transfer of learning is the process of taking information, skills, or attitudes from an educational experience and applying them to work or life in general.

Plan of Presentation

Following this introductory chapter, in chapter 2. I provide an overview of selected relevant literature. I review adult learning, contextual variables in the learning process, design strategies in relation to contextual variables, and transfer of learning. These topics are reviewed in the context of adult education and program planning with specific reference to the facilitator's role in implementing and evaluating an educational program.

In chapter 3, I describe the design and implementation of my study. I discuss how I created the educational environment to encourage critical thinking, reflection, and the use of transfer of learning strategies. In the implementation section, I address the relevance of the use of good teaching practices and their connection to the outcome of transfer of learning.

In chapter 4, I discuss the process and outcomes of the study in relation to the intended purpose. I interpret these findings in relation to other researchers' findings

reported in the literature. I provide conclusions and recommendations for other adult

educators who teach in contracted educational settings.

CHAPTER 2

REVIEW OF THE LITERATURE

Adult education often entails the design, implementation, and evaluation of structured learning activities. A component frequently missing is transfer of learning to the work place. In this chapter, I review the literature on adult learning, planning frameworks that facilitate the inclusion of transfer of learning in adult learning programs, and the concept of transfer of learning itself. The adult learning section provides the framework for the learning environment. The planning framework section explores program planning models that include the concept of transfer of learning. The concluding section on transfer of learning begins by defining transfer of learning. Two categories of design factors are discussed, learners' input and outcome factors are introduced, and the environment factors affecting transfer of learning inputs and outcomes are discussed.

Adult Learning

Adult learning is a complex and challenging phenomenon. In this section I review various definitions of adult learning, selected principles of adult learning, and contextual variables that affect learning.

Definitions of Adult Learning

In defining adult learning, I believe it is necessary to first define each word separately, and then define the words as a combined concept. The noun "adult" has many cultural, developmental, and descriptive meanings. Knowles (1975) articulates two criteria for adulthood. First, he maintains that "a person is adult to the extent that that individual is performing social roles typically assigned by our culture to those it considers to be adults." Second, he emphasizes that "a person is adult to the extent that that individual perceives herself or himself to be essentially responsible for her or his own life" (p. 24).

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Learning has been defined as both a concept and a process. Learning as a concept is defined by Heimlich and Norland (1994) as: "the act of aligning perceptions of reality with empirical or sensory data. [It]occurs because there is real benefit in having knowledge" (p. 142). These authors imply that learning occurs when previous perceptions of reality are not congruent with an individuals' present experience. Mezirow (1977) refers to this incongruence as dissonance. Robertson (1996) specifies two types of learning. The first, simple learning, and the second, transformative learning. "Simple learning refers to learning that further elaborates the learner's existing paradigm, systems of thinking, feeling, or doing relative to the topic" (p. 42). By contrast, transformative learning "causes the learners' paradigm to become so fundamentally different in its structure as to become a new one" (p. 43). Mezirow (1990) connects transformative learning and reflective learning to the learning process. He views learning as part of a process connected to what he defines as "making meaning:"

> Learning may be defined as the process of making a new or revised interpretation of the meaning of an experience, which guides subsequent understanding, appreciation, and action....It is not possible to understand the nature of adult learning or education without taking into account the making of meaning.... To make meaning means making sense of an experience. When we use this interpretation to guide decision making or action, then making meaning becomes learning. (p. 1)

Along with making meaning within the learning process comes reflection. Mezirow (1991) views reflection as a means of testing validity: "Reflective learning involves assessment or reassessment of assumptions....Transformative learning results in new or transformed meaning schemes or, when reflection focuses on premises, transformed meaning perspectives" (p. 6).

Brundage and MacKeracher (1980) have contributed to the research with an extensive study of adult learning principles. As a foundation for their work, they

reviewed the current literature in search of a definition of adult learning. Their search

provided the following definition, which is used throughout this thesis:

> Adult learning refers both to the process which individuals go through as they
> attempt to change or enrich their knowledge, values, skills or strategies and to the
> resulting knowledge, values, skills, strategies, and behaviours possessed by each
> individual. Learning is defined in the literature as a relatively permanent change
> in behaviours as the result of experience and as the activities involved in this
> process of change. (p. 5)

Several years later, MacKeracher (1996) added, "Learning is something done by the

learner rather than something done to or for the learner. Learning proceeds independently

of, and sometimes in spite of, education and schooling" (p. 3).

The concept of learning is one of the most critical, relevant, and inseparable

concepts of any educational activity. Within the context of learning, the adult education

literature distinguishes between formal and informal learning (Livingstone, 1999). All too

frequently, people associate teaching and learning exclusively with activities that take

place in formal settings where there are designated teachers and learners. In reality, much

teaching and learning that occurs is informal, implicit, and happens in transitory

situations during work or in daily living. Tough's (1979, 1982) extensive research

broadened the concept of learning by acknowledging that learning occurs outside the

classroom without assigned teachers. Informal learning consists of day-to-day activities

that individuals engage in as they work through relationships, buy a house, or maintain

their health. Livingstone found in his survey that "adults now spend on average of 15

hours a week on informal learning" (p. 8). Within the health profession, Farquharson

(1995) takes a stance consistent with Tough stating that "much teaching in the human

services setting is informal" (p. 4). He talks of learning as a continuing process because

"knowledge does not remain static and different sources of understanding can reinforce, contradict, or modify one another" (p. 6).

There are also diverse views about what learning is, how it can be facilitated, and, more importantly, how it can be transferred. The main concern of some authors (e.g., Caffarella, 1994; Hergenhahn, 1988; Kolb, 1984) is the application of learning theories, concepts, and principles. They tend to define learning as the acquisition of skills, knowledge, and ultimately, as a change in habits, attitudes, values, and behaviours. Hergenhahn notes that "learning is a relatively permanent change in behaviour or in behavioural potentiality that results from experience and cannot be attributed to temporary body states such as those induced by illness, fatigue or drugs" (p. 7). Kolb's perspective is that learning is transitory in nature: "learning is the process whereby knowledge is created through the transformation of experience....Knowledge is a transformation process, being continuously created and recreated, not an independent entity to be acquired or transmitted" (p. 38). Caffarella speaks of learning and adult education as processes whereby learners build on past knowledge and experience, and are motivated by a variety of teaching methods. For Caffarella, the purpose of education is to promote changes in the way individuals do their jobs so their performance is enhanced.

There seems to be agreement within the literature that three variables play a strong role in the learning process: the learner, the teacher, and the environment. There also seems to be agreement that learning is an experience where activities take place and change is expected; however, change does not always occur. Finally, learning is described as a normal function of living, "a necessity, for anyone young or old" (Cross, 1981, p. xxi).

Principles of Adult Learning

Many authors have extracted principles of adult learning from empirical

observations of adult educators in their practice. These principles seek to explain what the

conditions of learning are, and how they relate to adult educators' practice.

Brundage and MacKeracher (1980) did a far-reaching exploration of adult

learning principles and analyzed facilitation and planning implications for the

practitioner. Their 36 principles can be summarized in nine points: (a) adults learn

throughout their lifetime. (b) past experience may either help or hinder learning, (c) past

experience needs to be respected by the teacher, (d) learners with positive self concepts

are more open to learning. (e) supportive environments produce the greatest amount of

learning. (f) adults are motivated to learn in areas relevant to them. (g) voluntary

participation results in greater learning. (h) adults learn best when they are healthy both

physically and emotionally. and can control the pace of their learning. and (i)

collaborative modes of teaching and learning result in more meaningful learning.

In her later work. MacKeracher (1996) added to these adult learning principles by

stating that (a) learners need to be heard. meaning active participation is to be

encouraged. and opportunities for expression of feelings and perception are needed for

adults in their learning settings. (b) learners are to have some understanding of what they

need to learn or what skill they intend to change. and (c) learners need to leave the

learning experience with a clear idea of the behaviour that they learned so that they are

able to replicate it later.

Vella (1994) contributes to this list of conditions for learning by citing the need

for "praxis." which is learning by doing and reflecting on it. She emphasizes the need for

accountability by determining how learners know what they know, and by paying careful attention to the sequencing of content and the reinforcement of the content.

Knowles (1980) identifies six conditions of learning and connects these to principles of teaching. Knowles views the conditions of learning as part of the learning-teaching transaction and does not separate the concepts of learning and teaching. He believes that excellent conditions of learning occur as a result of good teaching practice within the teaching-learning transaction. These six conditions are: (a) learners feel a need to learn, (b) the environment needs to be comfortable physically, psychologically, and emotionally, (c) learners need to experience ownership of the learning goals, (d) learners need to share responsibility during the entire learning process, (e) the process needs to relate directly to the learners' experience, and finally (f) learners need to experience a sense of progress.

These identified principles, conditions, and definitions emphasize that learning is a process rather than an end product. These authors focus on what happens when learning takes place. It is evident that the learner, the teacher, and the environment are all identified as variables in the learning process. Each of these variables inter-connect and cannot be separated from the process. In the next three subsections, these variables are explored further and connections are exemplified.

Role of the Environment

The environment has been thought to be one of the basic parts to understanding human behaviour in the learning setting. Haertel and Walberg (1988) suggest that learner interest, willingness to participate, and performance are aspects of the learning environment that affect learning. Long (1983) states that, in the teaching-learning

exchange, the purpose of the physical environment is to assist in the creation of a positive, affective environment. Adult educators believe that organizational factors, including the people, structure, and culture, can either facilitate or deter learning. This belief has been succinctly stated by Knowles (1980):

> The quality of learning that takes place in an organization is affected by the organization it is. This is to say that an organization is not simply an instrument for providing organized learning activities to adults; it also provides an environment that either facilitates or inhibits learning. (p. 66)

In order to facilitate learning, educational organizations often address the environment in one or a number of ways: the physical environment, the emotional or psychological climate, or the structure and the participants. Knowles' (1980) description of an educative environment is very inclusive. He outlines four basic characteristics of educational environments that are important for organizations to create in order to help people learn: "(1) respect for personality; (2) participation in decision making; (3) freedom of expression and availability of information; (4) mutuality of responsibility in defining goals, planning and conducting activities and evaluating" (p. 67).

Heimlich and Norland (1990) describe physical environments as "the ecology of study areas, the sum total of the physical comfort, climate, setting and classroom arrangement, arranging facilities equipment, and materials for adult instruction purposes" (p. 245). Some authors also include the social context and the presence and interaction of human beings in the physical environment. Brookfield (1990) calls this a "learning community" (p. 55).

In summary, three core ideas emerge throughout the literature on the broad topic of learning. The first is that the physical environment has the potential to affect the teaching-learning exchange. However, these effects come from the individual learners' perception, not from the actual physical layout. The second idea concerns the individual learners' perception of the environment. No two individuals' experiences are alike; therefore, each person will potentially have a different learning experience. Finally, the

teacher consciously or subconsciously chooses to use a combination of strategies, elements of presentation, or teaching styles to influence the learners' experience within the environment.

Role of the Teacher or Facilitator

In exploring the role of the teacher or facilitator as a variable, the literature distinguishes between teacher qualities and facilitation skills. Lenz (1982) specifies requisite characteristics for a teacher, some of which are: knowledge of the subject and of teaching techniques, willingness to learn from the students, intellectual integrity, broad cultural perspective, freedom from prejudice, interest and belief in students, a warm sympathetic personality, and a sense of humor. Lenz also suggests that these characteristics are based on the idea that teaching is an art and not a science or a business. Highet (1989), who also wrote about the characteristics of good teachers, added that the qualities of enthusiasm for the subject, a good memory, and will power to limit one's expression of insights and knowledge, are necessary in order to listen to those of the learner. Heck and Williams (1984) suggest that human qualities are what separate the great teachers from the good ones. They identify such human qualities as trust, caring, sharing of self beyond the facts of the curriculum, dealing with real feelings, and sharing experiences. Being a person-oriented individual who is authentic and honest while maintaining a sense of professionalism, are also qualities of good teachers identified by these authors.

A significant body of writing about the concept of facilitation complements research on the qualities of a good teacher. The notion that educators should function as enablers or facilitators of learning is an idea derived chiefly from the humanistic psychotherapy work led by Carl Rogers. In the literature, educators and trainers regularly declare themselves as facilitators of learning, rather than teachers or instructors (Brookfield, 1986; Cross, 1981; Knowles, 1975; MacKeracher, 1996). Facilitators of

learning see themselves as resources for learning rather than didactic instructors who have all the answers. In describing the transition to facilitator for adult education teachers. Brookfield (1987) succinctly states, "The teacher moves from acting as an authority figure to become the guide" (p. 4). Facilitators see themselves as engaged in a democratic, student-centered practice of enhancing individual learning. They place the responsibility for setting the direction and methods of learning as much with the learner as with the educator.

Various writers have specified the educational skills required of the best facilitators. Tough (1979) identifies four of these characteristics:

> They are warm, loving, caring and accepting of the learners. They have a high regard for learners' self-planning competencies and do not wish to trespass on these. They view themselves as participating in a dialogue between equals with learners. They are open to change and new experiences and seek to learn from their helping activities. (p. 183)

There seems to be agreement among researchers that the individual imparting the information has to demonstrate positive human qualities and be responsible for the dissemination of the information. If these qualities are not present then the quality and the degree of success in the exchange will be diminished. This may be a simplistic view, but facilitative teaching has the potential to excite and inspire. Without this type of teaching, learning can be reduced to repeating and reciting. However, it does not matter how teaching is labeled. What matters is that teaching is the human interaction among the content, the environment, and the learners.

Context of the Learner

The definition of adult learners and the identification of their characteristics are woven into the concepts of learning and educator practices. This is exemplified by

Conti's (1983) research. Conti wanted to measure the extent to which practitioners supported the collaborative mode of teaching and learning that he described as "good practice." He developed an instrument capable of measuring the degree to which adult education practitioners accept and adhere to the principles of adult learning. The instrument he developed does indeed measure what he intended; however, the process that he went through focussed only on the practitioner and not on the learner. Conti reviewed the work of a number of highly regarded theorists to discover what they held as basic assumptions of adult learning. Summarizing ideas from prominent adult education figures such as Freire (1970), Lindeman (1926), Houle (1926), Knox (1976), Kidd (1973), Knowles (1984), and Bergevin (1967), Conti extracted several similarities:

> The curriculum should be learner centered, the learning episodes should capitalize on the learner's experience, that adults are self-directed, that the learner should participate in needs diagnosis, goals formulation and outcomes evaluation, that adults are problem centered and that the teacher should serve as a facilitator rather than as a repository of facts. (p. 63)

Conti's extraction of basic assumptions about adult learning from leaders in the field illustrates key expectations of learners' behaviour, the need for participation within a process, and the importance of a relationship between learners and educators. Learners are not characterized as passive participants but, rather, as active members in the process. Roles and responsibilities are defined, life experiences are acknowledged, and motivation is needed if a change in the learner is to occur. Learners have shared responsibility for the process: they need to be aware of their present abilities, skills, and knowledge or prepared to assess them if they are to change and practice new learning.

MacKeracher (1996) reinforces the idea that the information being shared with the learner needs to relate to the learners' life experience and developmental needs.

Learning needs to foster the learner's growth and movement towards greater autonomy. This is directly connected to the development of a learning environment that is non-threatening, supportive of experimentation, and respectful of individuals' different learning styles. MacKeracher identifies the concept of self as one important characteristic that defines the learner. This concept of self, combined with the ability to think about self, and how one appears to others, is a link to one's inner identity and reality. MacKeracher firmly believes that the self is a basic and essential component of the learner because one's self is comprised of meanings that identify the individual. She identifies five aspects of experience that make up the individual's self: physical, cognitive, emotional, social, and spiritual elements.

In summary, the learning environment is composed of several variables that are interconnected and that lead to some type of change within the teaching-learning exchange. No one variable can stand alone as influencing the end result. Each variable plays a role in the educational program and change can be related to the individual, the organization, or to the community as a whole. It is important to note that because of the interconnected nature of the variables, each variable needs to have equal status in the planning and implementation of the exchange. This acknowledgement of linkage is relevant for the health-care worker as a learner. The next section examines the similarities and differences of health-care workers as adult learners.

Health-Care Workers as Learners

Like all adult learners, health-care workers have learning needs, expectations, life experience, and are motivated to play some role in their learning. However, their work environment may pose limitations that do not allow them to be active learners. Knowles'

(1980) assertion that "the quality of learning that takes place in an organization is affected by the kind of organization it is" (p. 66) implies that the environment can either facilitate or inhibit learning. In this subsection, I discuss three factors within the learning environment that have the potential to influence health care workers as learners. The first issue is the assessment of need, the second issue is relevancy, and the third is teaching within work groups.

Assessment of learner's need is cited as a basic principle of adult learning (Fox, 1994; Heimlich & Norland, 1994; Vella, 1994). As Vella states, "Listening to the learner's wants and needs helps to shape a program that has immediate usefulness to adults" (p. 4). Ideally, a teaching intervention should assess existing knowledge and skills of the prospective learners. It is usually preferable to identify the appropriate skill level, knowledge base, and issues from the learners. However, in the health-care system, the attainment of this information prior to an in-service session is not always possible so an "emergent assessment" (Farquharson, 1994, p. 46) may be more feasible. This type of quick assessment is completed at the start of the teaching intervention, and questions are asked about learners' needs, abilities, and motivations for attending the session. Typically, health-care learners do not participate in prior learning needs assessments. Decisions about needs are made by management, or are regulated by a governing body (Donkin, 2000). Some organizations, such as hospitals or small private care facilities, do attempt to provide health-care workers with an opportunity to express needs casually in meetings or in writing; however, even in these organizations, there is normally no formal process that includes their participation or guarantees that their requests will be honoured.

The second issue that influences health-care workers as learners is relevancy.

Continuing education or in-service sessions are often created around issues like

scheduling, finances, external legislative bodies, or client needs, rather than around issues

that arise from direct consultation with the employees, who are the learners. As

documented in the research (e.g., Farquharson, 1995; MacKeracher, 1996; Vella, 1994; &

Wlodkowski, 1999), learners need to participate in identifying their learning needs. When

learners are not included in the development process, or do not have a choice in

attendance, then there is an increased chance that the learners will be frustrated during the

teaching intervention.

Wlodkowski (1999) speaks of the link between motivation and relevance. He

notes that "when adults can see that what they are learning makes sense and is important

according to their values and perspective, their motivation emerges" (p. 7). He explains

that motivation is not only important because it improves learning but it also "mediates

learning and is a consequence of learning" (p. 5). Similarly, MacKeracher (1996)

emphasizes that content needs to be directly relevant to some aspects of what the learners

are currently doing because when relevance is present the learners are more likely to be

motivated to look for connections and to develop new meanings. Parry (1990b) identifies

relevance as a perception of the learner as to whether the content is relevant to the job or

the learners' own personal needs. It is possible that the employer and the employee (as

learner) could have different views and perceptions of relevance and this may lead to

interference regarding the success of immediate learning and potential transfer of

learning. With relevance comes the recognition of the relationships and responsibilities

among the learners, the facilitator, and the employer. Wlodkowski ties relevance to

personal meaning. He believes that learners connect their learning experiences to who they are, what they care about, and how they perceive and know. Having some degree of choice in the learning situation gives learners an opportunity for their voices to be heard and for them to feel a connection to their reality. As Wlodkowski puts it: "People consistently struggle against oppressive control and strive to determine their own lives as an expression of their deepest beliefs and values. Learning is no exception" (p. 75).

The third issue within the health-care environment that influences health-care workers as learners is the constant rotation of defined work groups. Work teams are often created in relation to workload or client need, and rotating schedules typically are used to provide the framework for the shift rotation. This rotation of schedule places the health-care worker in a position of constant change for both their work and learning groups. Consistency only exists as the work roster permits and as the variables of staff turnover and illnesses allow.

In the context of adult learning and transfer of learning, the teaching-learning exchange needs to occur within the learner's natural work group. Vella (1994) strongly encourages the process of teamwork. She provides examples of how learning is enhanced by peers because they have similar experiences, and illustrates how peers can challenge other learners in ways that a teacher could not. Also, peers create a safe place for learners who are struggling with new or complex concepts. Wlodkowski (1999) uses the term "connectedness" (p. 70) to define the need for a sense of belonging and an awareness of each learner, so that there is an experience of caring for others and knowing that one is cared for. This connectedness or support is necessary if learners are to know they can express themselves fully without fear of making an error.

The research also stresses that working within intact work groups increases the likelihood of transfer of learning (Milheim, 1994; Zemke & Gunkler, 1985). The support that is connected with working together consistently enhances the likelihood of transfer of learning. If a learner goes back to the work setting after training without any type of connection or reinforcement from another person, then the loss of information is faster than when he or she is connected with another individual or group. Michalak's (1981) research illustrates that when individuals receive encouragement or support from others after training, the learners are better able to apply the new skills. He believes that a critical mass of ongoing support has more influence than one individual can have.

Planning Frameworks That Facilitate Transfer of Learning in Adult Learning Programs

Program planning models are numerous in both education and human resource literature. However, models including transfer of learning are not numerous. The following section begins by defining transfer of learning, then reviews four models that include transfer of learning as a part of the development and planning process. Each model is explained in context to its development and how transfer of learning is included. The fifth model focuses solely on transfer of learning.

Defining Transfer of Learning

Transfer of learning is a cognitive concept that explores an individual's ability to access and use previously learned information (Vella, Berardinelli, & Burrow, 1998). In the adult education literature, a variety of terms are used, such as application and praxis, in addition to the term transfer of learning. In the human resources literature the term is referred to as transfer of training. The idea of how or why information is used is articulated slightly differently to emphasize the context in which the term is used.

occurs outside of the classroom, thereby identifying the need to expect and to plan for the

learner's subsequent use of information. In contrast, Caffarella (1994) not only defines

transfer of learning but includes the concept as part of her program planning model:

"Transfer of learning is the effective application by program participants of what they

learned as a result of attending an educational program" (p. 108).

In the human resource literature, the concept of transfer of learning is identified as

transfer of training; this refers to improved performance or ability on one task as a result

of something acquired on a previous task. According to Campbell and Cheek (1989), the

key to training success "is the extent to which trainees transfer acquired behaviours from

training programmes back to their jobs" (p. 32). Garavaglia (1993) stresses the need for

practitioners in the human resource industry to plan and to incorporate transfer of

learning in the entire process of training because of its link to productivity. Although

some human resource specialists (e.g., Michalak, 1981) do not believe it is possible to

measure transfer of learning or return on investment, others (e.g., Phillips, 1996) have

statistically proven methods of incorporating transfer of learning techniques, and through

ratios, have illustrated how money has been saved by transfer of learning.

The literature contains several common factors contributing to the success of

transfer of learning. One of these is the degree to which there is a need for similarity

between the training situation and where the information is to be applied (Broad, 1982;

Parry, 1990a; Tallman & Holt, 1987). Another factor is the need to include learning

objectives (Campbell & Cheek, 1989; Ottoson, 1994; Wlodkowski, 1999). Although the

adult education and human resource literature cites effective instructional methods as a

significant factor in effecting transfer of learning, there is little agreement as to which

instructional methods are most effective. A factor generally identified is the need for the

learner to have a clear understanding of the learning experience. This is widely

understood as having access to a course outline, being able to clarify expectations, and

having the option to personally decide whether to attend. Other factors affecting transfer

of learning are the learning objectives, student aptitude, instructional methods, pre-

exposure to the material, and perception of the learning experience (Bryan, Beaudin, &

Greene, 1993; Garavaglia, 1993; Ottoson, 1994). Clark (1986), Torrence (1993), Vella et

al. (1998), and Wlodkowski (1999) all discuss the issue of appropriate student aptitude

and pre-exposure to the content as factors that influence the degree of transfer of learning

that can occur. Other factors such as relevance, memory, problem solving, reasoning,

motivation, and motor skills affect transfer of learning. Almost all theories of learning

address transfer of learning in one way or another. It is a topic that is linked to

accountability; yet, there is little consensus on how measurable the concept is and who

carries the most responsibility for the process.

Interactive Program Planning Model—Model 1

Caffarella (1994) describes her program planning model as being eclectic and

complex in nature. She believes planning is comprised of numerous components and

tasks that need not be addressed at the same time or in a standard order. Therefore, the

planning process encourages communication and negotiation among educators, learners,

and organizations. This, in turn, demands flexibility. There are 11 components to

Caffarella's model and numerous tasks within each component that act as decision points.

Not all program planners need to go through each component, nor do they need to

perform the component activities in any specific order. These decision points offer the

planner choices depending on the circumstances so that decisions are best made to suit the situation. These same decision points may be revisited many times during the process of planning a program.

A primary component of Caffarella's (1994) model is establishing the purpose or basis for the planning process. This component looks at the support systems for the program, both internally and externally. Without support, motivation will not likely be consistent. An important component for many programs is identifying program ideas. Because she believes that program ideas can come at any time and from numerous sources, Caffarella stresses the importance of not relying solely on needs assessments. Whenever ideas are identified, the ideas should be used to develop the program objectives. These objectives reflect what learners will be learning. Decisions are made connecting the program development before, during, and after the intervention. Another important part of her model is evaluation. Here, planners make judgements as to what information will be collected and how it will be used and interpreted so that future decision can be made. Another component is determining the format, schedules, and needs of the staff. Here, the programmer creates a format that best suits all of the variables. This format allows for a holistic perspective of the entire program. The programmer decides on the most appropriate learning activities to meet all of the identified needs and variables. During the creation of all programs, finances are addressed and re-addressed. Caffarella's model includes a component that addresses the budgets and marketing plans. This component thoroughly explores the issues and complexity of making a profit or breaking even.

Three other components to Caffarella's (1994) model are instructional design, coordination of facilities, and communication of the value of the program. These are all components that focus on the logistics of delivery. Caffarella identifies connectedness between components as integral to the success of any program. Finally, Caffarella is one of the few authors who acknowledges the importance of follow-up. Many authors have their models end after the delivery of the program; however, Caffarella connects her ending to another part of the model so that learning does not stop. It is perpetuated by the questions, answers, and learning that occurs even after the program officially ends.

Garavaglia's Process Model—Model 2

Transfer of training is the "effective and continued application to trainees' jobs of the knowledge and skills gained in training" (Garavaglia, 1993, p. 63). Garavaglia states that, in theory, transfer of learning is a relatively simple concept. However, in practice, it is difficult to obtain. For this reason, he created a comprehensive process model for transfer of training. The model begins by determining the initial performance measures. He believes that baseline performance is essential, and without this information, no one knows what the target is and whether it was hit. He suggests that baseline information can be collected from needs assessments, quantified business needs, identified problems in operations, or identified opportunities. The systemic design factors can be identified from performance measures, according to Garavaglia.

Garavaglia (1993) also identifies trainee and organizational characteristics. Trainee characteristics include their motivation, goals for participating, and ability to self-monitor their progress. Organizational characteristics include information obtained from the interactions between the supervisors and peers that affect the learner's

perception of the working climate. These perceptions are very powerful due to the structure and nature of the hierarchy in most work places. For Garavaglia, it is essential that supervisors are informed, trained, and supportive of the training that is occurring. For example, if supervisors are unfamiliar with the training content and perceive it as having no value, they will be reluctant to allow their employees to attend programs or use skills that they have learned. This also goes along with the supervisor's perception of their employee's abilities or skill level. Supervisors who have little confidence in their employee's abilities likely will not assign duties even if the employee has been trained. Instructional design factors include the specific identification of strategies and materials to be used to link the skills from the work site to the classroom. It is at this stage that a conscious effort is made to consider the applicability of the information to the job, with transfer of learning as the intent, rather than assuming that somehow transfer of learning will occur on its own.

Training is the next stage in Garavaglia's (1993) model. It is based on the information collected from the previous two stages. Decisions about the structure and content are based on need, organizational climate, workflow, use of new skills, intentions of follow-up, and learner's attention. Although a trained professional performs the concrete training stage, the collection of information and determination of need involves the learners, organization, and facilitator. Maintenance is the stage that follows the training. This stage includes activities to promote the use of the newly acquired skills when learners go back to their jobs. At the maintenance stage, work obstacles can include a lack of: (a) support between learners and their supervisors; (b) adequate communication or an established feedback loop; (c) equipment, tools, or materials; (d) or an ergonomic

environment that prevents skills and knowledge gained at training from being applied on the job. The final stage is the transfer of learning performance measure. According to Garavaglia, this is the measure developed to determine if the original problem has been corrected, and if it has not been corrected, to determine if the problem is in the training or in the maintenance system. From this information, decisions can be made to improve the entire process.

Tallman and Holt Matrix—Model 3

As specialists in continuing education, Tallman and Holt (1987) are concerned with the lack of documentation on transfer of learning from continuing education programs to the work setting. They state, "Transfer of learning means that attitudes, knowledge, and/or behaviours that are presented in an a nonwork setting are later utilized fully or in a modified manner in settings external to the program, generally work setting. Transfer implies change" (p. 15). In trying to understand transfer of learning better, they developed a matrix of control factors. The focus of this matrix is on identifying the degrees of control that the programmer has over influencing transfer of learning factors of the organization, the individual learner, and program design. Tallman and Holt recognize that educators focus mainly on program delivery; what happens after the program is delivered is not usually given much consideration. They explain that this is a flaw in the process. They believe that educators need to play a greater role in the transfer of learning process and to ensure adequate documentation is done to verify that the educational program was a positive intervention. Because this matrix focuses on the programmer, it presents a clearer picture of the roles, responsibilities, and complexities of the transfer of learning process.

Analoui's Socio-Technical Approach—Model 4

Analoui (1993) presents a socio-technical approach as a means to explain the

complex phenomenon of effective transfer of learning. He describes transfer of learning

as a dynamic process that begins with learning and continues to be present even after the

learning is completed. Nevertheless, his observation is that transfer of learning has been

dealt with as a detached stage in the programming and not as the process that it is. In his

search to understand the process of transfer of learning, Analoui found that teachers,

trainers, and organizers of educational interventions assume that, at the end of the

intervention, the learner has the motivation and ability to follow through and introduce

the changes when they are back at their job. This, he says, is a problem.

Analoui (1993) argues that the necessity for post-intervention activities that

encourage learning to occur are either unknown or ignored in the work place. He notes

that most research on transfer of learning analyzes the type of information that has been

learned but does not analyze the social organization of learning. It is realistic to assume

that the work place context in which transfer of learning is expected to occur is actually

supportive of this. His aim is to demonstrate that although the task-related content is

important

> for the transfer of learning problem to be solved, the process must include a better
> understanding of the factors, of both a social and technical nature. For these
> factors act as facilitators and inhibitors towards the realization of effective
> transfer of learning into the workplace. (p. 17)

In summary, all four models identify that the greatest problem with transfer of

learning from the classroom is the difficulty of re-entering the work place to actually

maintain or refresh the learning. Caffarella's (1994) model incorporates strong strategies

to encourage transfer of learning. Analoui's (1993) explanation of the need to understand and incorporate the social dynamics is also very significant. Garavaglia (1993) focuses on the importance of involving all levels of personnel from within the organization before the instructional design is finalized so that skills and specific needs can be incorporated from the work site to the classroom. Tallman and Holt (1987) recognize the complexity of transfer of learning and focus on the role that the programmer or educator has in defining limits on the degree of success of transfer of learning when the issue of re-entry to the work place is not addressed. It seems that the authors agree that the planning process is dynamic and that transfer of learning needs to be included and not thought of as a detached stage. If this type of integrated approach is used, then it is more likely that those wishing to include transfer of learning as part of their planning process will be successful.

Baldwin and Ford — Model of Transfer of Learning—Model 5

This discussion now leads to the fifth model, created by Baldwin and Ford (1988). In an attempt to group and organize the information gathered from an extensive review of literature on transfer of learning, they created a model of the transfer of learning process which sheds light on the common aspects of the models described above. They describe the transfer of learning process in terms of training-input factors, training outcomes, and conditions for transfer of learning, as follows:

> Training outcomes are defined as the amount of retention of that material after the program is completed. Training-input factors include training design, trainee characteristics, and work-environment characteristics. Trainee characteristics consist of ability or skill, motivation, and personality factors. Work environment characteristics include climatic factors such as supervisory or peer support as well as constraints and opportunities to perform learned behaviours on the job. (p. 64)

The next portion of this review is based on Baldwin and Ford's (1988) model as a framework to explore transfer of learning issues within the planning process. The identified topics for review are: design input factors, design factors on outcomes and implementation, learner characteristics on input factors, learners as factors affecting transfer of learning outcomes and strategies, and work environment factors affecting transfer of learning inputs and outcomes.

Design Input Factors

Baldwin and Ford (1988) noted that a large part of empirical research on transfer of learning has concentrated on improving design through the incorporation of learning principles. One of these principles is the notion of identical elements originally proposed by Thorndike and Woodworth (1901). These authors worked towards illustrating that it was possible to make people behave in certain ways. One of the requirements for this was to have the learning environment identical to the environment in which the skill is subsequently demonstrated. They hypothesized, and later proved, that transfer of learning could be maximized if identical stimuli were present. Baldwin and Ford researched several authors who questioned and tested the principle of identical elements and found four other empirical studies that confirmed a need for the learning environment to be identical to the environment in which a skill is to be demonstrated. Skinner (1971) built on Thorndike's work to show that reinforced behaviour tends to be repeated behaviour. Skinner used positive and negative reinforcement to illustrate that reinforcement has the potential to motivate and extend learning. Current literature still supports the idea of identical elements and reinforcement. Garavaglia (1993) speaks of identical elements in the context of transfer of learning:

Transfer is more likely to occur when identical elements appear in two different situations. For instructional designers, that means that tasks taught in the training should closely match tasks that people do on their jobs. The training's content and activities should reflect the real world. (p. 67)

Positive reinforcement is reported in both the training and education literature (Torrence,

1993; Wlodkowski, 1999). Garavaglia addresses the issue of support and positive

reinforcement in relation to reinforcement by stating that:

A strong correlation exists between training transfer and the quality and amount of managerial support. When supervisors use a positive approach, employees' behaviour changes are still evident 6 to 12 months after training. When supervisors use a negative approach, behaviour changes practically disappear in 6 months to a year. (p. 68)

A second principle, found by Baldwin and Ford (1988), concerns the use of

general teaching principles. The adult education literature maintains that transfer of

learning is facilitated when learners are not only taught applicable skills but are also

given general rules and theories that underlie the content. Knowles (1980) groups the

organizing principles into four categories: simple to complex, expository order based on

prerequisite learnings, exposition that proceeds from the whole to the part, and

chronological ordering. He also states that "where development of behaviour is the

primary concern, other organizing principles are increasing breadth of application,

increasing range of activities included from the part to the whole, a demonstration or

direct experience followed by the development of principles" (p. 235). Caffarella (1994)

talks of key factors that enhance the transfer of learning process. General teaching

principles are addressed as ways to enhance the content. This content includes the

knowledge, skills, and values to be learned. The content is presented in such a way that it

is relevant and practical; connects knowledge, experience, and the learner's ways of

knowing; and is practiced in relevant contexts.

The third principle presented is stimulus variability. This concept is based on the idea that transfer of learning is maximized when a variety of relevant stimuli are presented. Ellis (1965) states that:

> understanding the similarity of relationships among tasks [is necessary] to predict the course of transfer of learning, for we do not learn in a vacuum--our present learning is influenced by our previous learning.... The greater the degree of similarity between the two tasks, the greater the amount of positive transfer is obtained. (p. 16)

Conditions of practice are the fourth principle discussed. The current literature defines conditions for practice in four ways. The first is distributed learning which means the retention of information is longer when all of the concepts are taught together rather than when they are broken up. The second is choosing a whole skill model for teaching. This involves teaching the entire skill but dividing it into parts, which ultimately leads to the whole. Georges (1988) prefers using a whole-skill model when teaching soft skills. He states that when skills are taught, steps are presented with the goal of being able to do the entire skill. The problem with this is "that steps in the process are not the skill. Skill is what it takes to execute the steps successfully" (p. 43). Georges' contention is that to be able to teach and transfer a skill, the whole concept must be presented first, and then broken down into manageable chunks of learning. The third condition of practice is deciding when to give feedback to the learners, and on what part of their learning to give feedback. Torrence (1993) and Wlodkowski (1999) connect the concepts of feedback and motivation to the end result of the learner's increased learning. Both researchers encourage the use of positive feedback as a means to give correction, to acknowledge learner responses, and to create a positive learning environment. The fourth condition is the concept of over learning or having learners practice beyond mastery. This technique

is encouraged by Zemke and Gunkler (1985). They state over learning is useful because "people must learn what to do, how to do it and when or under what circumstances to do it" (p. 56). Over learning is also encouraged by both Milheim (1994), and Tallman and Holt (1987), who note that an idea can be illustrated in different ways when it is repeated. However, Tallman and Holt also identify that although "over learning has proven to be positive, often programmers are unable to provide the time necessary for over learning to occur" (p. 29).

Design Factors on Outcomes and Implementation Strategies

Program design and delivery are the variables over which facilitators have the most control. Facilitators take the defined needs, expectations, and future use of information to create the learning experience. Several researchers (e.g., Brookfield, 1985; Farquharson, 1995; Ottoson, 1995) have clear recommendations on strategies and formats that facilitators need to use not only to assist in the creation of a productive learning environment but also to increase the likelihood of information being used outside of the learning environment.

Brookfield (1985), Farquharson (1995), Ottoson (1995), and Zemke and Gunkler (1985) emphasize the importance of promoting conceptual learning. These authors believe that a higher level of learning increases critical thinking. Their belief is that, with critical thought, abstraction and the application of information are more likely to occur. Tallman and Holt (1987) reinforce this idea by emphasizing the necessity to teach basic skills and concepts that are then generalized to more specific situations. Tallman and Holt believe that this will encourage the learners to think at various levels.

Analoui (1993), Tallman and Holt (1987). Fox (1984), Wlodkowski (1999). and

Zemke and Gunkler (1985) are all very clear on the need to use a variety of teaching

methods to increase transfer of learning. They believe that there needs to be a balance in

the classroom between the amount of teaching and the variety of ways in which the

information is presented and practiced. These authors also firmly support the use of

modeling or demonstration as a tool to illustrate how a new skill and new behaviours are

superior to the current ones. To achieve this level of understanding and to develop a sense

of the practical use of the new skills, learners require the opportunity to practice both

correct and incorrect behaviours. This entire process also needs to include time for over

learning. Learners need enough time to practice and feel confident with new information

before more information is introduced. Zemke and Gunkler point out that "when enough

time is not allowed, negative transfer occurs" (p. 28). With the division of time comes the

need for awareness of the pace of instruction. Facilitators have to allow for interactive

time. Skills need to be divided into small components. It is also important not to overload

the learners with information.

Wlodkowski (1999) and Brookfield (1986, 1990) encourage the use of interactive

strategies between the facilitator and the learners, both to keep the interest of the learners

and to help the facilitator ascertain the learners' level of understanding regarding the

content. Interactive strategies include stories, anecdotes, quotations, examples, and

analogies. These strategies have the potential to "give learners a way to focus new

learning so that it is concretely illustrated in their minds" (Wlodkowski, p. 206). These

authors also encourage risk taking. and the creation of uncertainty and anticipation as

methods to stimulate the learners. Wlodkowski states that "when our learners do not

know exactly what is going to happen next or when, we have usually captured their interest and anticipation. This is the way learning can become an adventure" (p. 208).

Cormier (1984), Tallman and Holt (1987), Wlodkowski (1999), and Zemke and Gunkler (1985) discuss how newly learned information needs to be integrated with learners' existing information. Farquharson (1995) found that "demonstration of the actual behaviour was the best strategy for the integration of information" (p. 220). Demonstration allows for observation, comparison, critique, discussions, and critical thinking. Cues and examples may also be used. A caution given by Zemke and Gunkler is that when demonstrations, cues, or examples are not part of the learners' experience or work environment, the result will produce a zero or even negative impact on transfer of learning. Farquharson (1995), and Zemke and Gunkler, suggest the use of job aids (such as check lists and slogans) as reminders that the learners can take with them to help recall the information later.

Another strategy that Zemke and Gunkler (1985) found useful was "the application of mental rehearsal and imagery" (p. 57). They found these strategies were powerful in assisting in the reduction of fears, and the building of confidence and skills. It was also Zemke and Gunkler's experience that to better prepare learners for the educational session, the creation of pre-course homework was helpful. This process helped the learners review content, gave them a context to focus on, and provided them an opportunity to formulate some questions (p. 52).

Farquharson (1995) uses follow-up teaching sessions with content review as an opportunity to fine-tune the application of prior learning. These sessions assist in trouble shooting and building confidence in the learners (p. 223). Clark (1986), Ottoson, (1995),

Tallman and Holt (1987), and Zemke and Gunkler (1985) all support the use of follow-up

teaching sessions to encourage transfer of learning.

Learner Characteristics as Input Factors

Baldwin and Ford (1988) identify skill, ability, motivation, and personality as

specific learner characteristics that are linked to transfer of learning. However, these

characteristics were identified from practitioner reports and not from rigorous research

studies. Little or no research has been conducted on how those factors affect transfer of

learning.

Caffarella (1994) speaks generally about why people do, or do not, apply what

they have learned, linking these reasons to "key influencing factors" (p. 110). One factor

is program participants:

> Participants bring to educational programs a set of personal characteristics,
> experiences, attitudes, and values. These influence both what they learn and
> whether they can and want to apply what they have learned to their personal,
> work, and/or public lives. (p. 110)

This general statement leads to the questions: How does the learner's past experience and

knowledge embrace or enhance the content that is to be addressed? Do learners possess

the required knowledge, skill, or experience regarding the topic prior to the learning

intervention? Are learners interested in changing or exploring how they presently achieve

the skill being taught? What is their skill level and how will this affect their learning?

Although Vella (1994) does not speak specifically of participant characteristics,

she believes that the educator may not be able to influence values, motivation,

personality, or skills -- thus the "task as educators is to make the learning so accountable,

the engagement so meaningful, the immediacy so useful, that the unhealthy attitude will

change in time" (p. 169). Although Vella does not link motivation to the tasks of the

educator in her statement, she implies it. because the learner must be engaged in the

learning process to learn. Wlodkowski (1999) believes motivation is important not only

because it improves learning but also because it assists in the learning process. He further

states:

> That although motivation is a necessary condition for learning, there are other
> factors — ability and quality of instruction which are also necessary for learning
> to occur. [However], if people are given learning tasks that are beyond their
> ability, no matter how motivated they are, they will not be able to accomplish
> them. (p. 5)

Wlodkowski also believes that motivation is enhanced when adults see that what they are

learning makes sense, is consistent with their values, and is relevant to their life

situations. Wlodkowski emphasizes this by stating:

> People perceive personal relevance when their learning is contextualized in their
> personal and cultural meanings. allows their voice to remain intact. and reflects
> their construction of reality. In other words. the learning is connected to who they
> are. what they care about, and how they perceive and know. (p. 74)

Learners' Effect on Transfer of Learning Outcomes and Strategies

The literature specifies roles. responsibilities. and involvement of the learners in

the process of transfer of learning. Learners are not identified as passive beings in the

process but rather as active participants before. during. and after the learning occurs.

Caffarella (1994). Ottoson (1994). and Zemke and Gunkler (1985), for instance.

emphasize the need for learners to participate prior to the learning session. This early

involvement enables learners not only to be able to identify their needs. and set goals. but

to assess their skill level. This process can assist in the clarification of objectives and

expectations. as well as prepare learners for the content. This pre-involvement also sets

the stage for accountability. Another pre-learning requirement that Caffarella, and Zemke

and Gunkler identify is the need for clear expectations to be articulated by all individuals

involved in the process of the training. These individuals include managers, supervisors, trainers, and learners. These authors believe that the expression of expectations allows for clarification and verification of support, and also decreases the chances of misinformation.

Clark (1986) identifies a criterion that needs to be in place for learners to be able to maximize their learning experience. She states that only the learners actually needing the training should attend and that the needs of these learners must match the skill being taught as well as future skills needed on the job. Another important issue that Clark discusses is the timing of the intervention. Training needs to be available when the learner needs the information, not when the schedule allows. This, then, puts pressure on the organization to create alternative ways of providing information for learners. Clark states that all of these factors contribute to accountability which is absolutely essential in the transfer of learning process.

Farquharson (1995) stresses the importance of training within intact social systems so that there is the opportunity to use the new knowledge, skills, or values. Clark (1986), Fox (1984), and Zemke and Gunkler (1985) articulate the same need. Clark, however, uses the words "intact work groups" (p. 85) to refer to these social systems. Learners are more likely to try new skills, and to observe and support fellow workers if they have experienced similar learning interventions.

Work Environment Factors Affecting Transfer of Learning Inputs and Outcomes

Building on Kurt Lewin's early work on forces influencing change, Analoui (1993) notes that there are forces that work for and against the process of transfer of learning and "attention needs to be paid to both the social and technical aspects of

training in order to pin-point the facilitative or inhibitive factors which are present in the learning situations and the organisation" (p. 10). In Analoui's opinion, the learner should not be viewed in isolation from the actual work environment.

Another important factor affecting transfer of learning, cited by Tallman and Holt (1987), and Zemke and Gunkler (1985), is the support of the supervisor. These researchers agree that a pre-course needs to be provided for supervisors prior to training their employees. This process is essential to inform supervisors of the training, to update their skills, and to assist them in being supportive to their staff following the training. This process can also help supervisors identify possible barriers that presently exist that would deter transfer of learning in the future. Transfer of learning occurs more readily because of the supportive environment for change and the individual reinforcement for change provided by one's supervisor. Analoui (1993) observes that "support provided by the coach/supervisor is probably the single most important factor in the occurrence of effective transfer" (p. 72).

Summary

Adult learning is comprised of several variables that are interconnected and that lead to some type of change within the teaching-learning exchange. No one variable can stand alone as influencing the end result. Each variable plays a role in the educational program: change can be related to the educator, the learner, the organization, or the community as a whole. Because of the interconnected nature of the variables, each variable needs equal status in the planning and implementation of the exchange.

Having identified the variables and having recognized the importance and roles the variables play in the teaching-learning exchange, the educator must then decide on a

program planning framework for delivery of the program. The educator's choice is based on information, desired results, and purpose of the educational program. For the purpose of this study, five frameworks were chosen because they included the concept of transfer of learning as part of the process. All five models identify that the connection between the classroom and the work place is the area of greatest difficulty. Researchers agree that the planning process is dynamic and that transfer of learning needs to be included. It should not be thought of as a detached stage. They believe that if educators include transfer of learning as part of their planning process learners will be more successful.

The literature exemplifies the complexity that the concept of transfer of learning contributes to each of the learning variables. Design factors and strategies were identified for input and outcomes for each of the variables. The conclusions drawn were that the concept of transfer of learning is complex. No one variable can be given credit for influencing transfer of learning more that another. When attempting transfer of learning strategies in a teaching-learning exchange, it is important that the educator use best practice principles in the process. Many researchers suggested that transfer of learning could be attributed to a complex mix of variables including the facilitator, the learner, and the planning strategies.

In the next chapter I describe the process of adapting transfer of learning strategies within in-service sessions. I focus on my use of best practice principles to increase transfer of learning.

CHAPTER 3

DESCRIPTION OF THE STUDY

I conducted a study to explore optimal conditions for successful transfer of

learning in a work place using 12 one-hour in-service sessions. The sessions were part of

the staff development program in three medium sized long-term heath-care facilities that

provide service to a community of 75,000. This chapter describes the study in three

sections. The first section presents the planning that occurred between October 1995 and

January 1996. I include my assessment of the learning needs, the design decisions, and

the strategies used. In the second section, I describe the structure and delivery of the in-

service sessions that took place during February–March 1996. In the third section, I

present the evaluation results, with an emphasis on the follow-up interviews that took

place during June 1996.

Planning the In-Service Sessions

Comprehensive planning and design were an integral part of the study. In this

section, I describe the processes of soliciting staff development needs from the employers

and assessing the support needs of the learners. I state my overarching design questions,

my suggestions for promoting a positive learning environment, and my strategies for

transfer of learning.

Employer Staff Development Needs

In soliciting ideas on staff development needs, I attempted to use a process of

inclusion. This attempt was outlined in a letter I sent to each director of care introducing

myself and inviting her participation. Part of this letter included a proposed outline of

events indicating a possible time frame. I suggested an initial meeting with each director

of care, another meeting with their supervisors and staff to discuss their training needs, and a final meeting with each director of care to review the project and confirm the in-service series. I concluded the letter by stating a time that I would call to confirm their participation and arrange an initial meeting. Upon contacting each director of care to arrange a meeting, none of them expressed an interest in having me meet with their staff. They each had firm opinions that they knew what their staff needed in relation to content. Independently, each director of care requested that I bring some possible topics with me to our initial meeting. They would choose something appropriate for their staff from these options. Based on my work in similar facilities for 10 years and my added experience as an adult educator, I chose six topics that I thought would be relevant. I submitted these six topics with detailed course outlines in advance of our meetings, allowing time for each DOC to review the information. Of these six topics, all three administrators chose the following three sessions: (a) Problem Solving: How I solve problems and how I can be a better problem solver. (b) Motivation: How I motivate myself to do the excellent work that I do. and (c) Caring: Why I care and what caring really is. They stated that these topics constituted information their staff needed, and reassured me that their staff would find the content interesting and relevant to their work. These meetings also included extensive discussion on the specific content that I would be presenting at all three facilities. Each DOC reviewed the course outlines I had submitted and were thorough in clarifying the areas which they thought their staff needed extra information. One director wanted each content area to have a slant on improving staff morale. A second director gave me the impression that she did not have preferences. The third director had me explain everything in great detail and accepted what I had presented with

no modifications. All three meetings ended with the director saying that she expected that each session would be professional, relevant to all staff in all departments, and interesting.

In our initial meeting, the first director stated that she tries to provide as many in-service sessions for her staff as she can and makes an effort to encourage staff to get as much training as possible, both inside and outside of their work place. She said that I should expect representatives of all disciplines to attend and participate. She stated her conviction that she did not believe that only nursing staff should have opportunities for in-service sessions, but that all departments working with the residents need to be informed and aware of issues. In her facility, separate training is done only when it is job specific, such as training in nursing procedures or the use of chemicals in housekeeping. She believes that she offers a well-balanced in-service program for her staff that meets the defined regulations within the accreditation process. This director was the one who made the request that in-service sessions be presented twice, so individuals could exchange shifts and thereby maximize attendance. She expected 10 to 15 people to attend each session. This initial meeting lasted 90 minutes and included a tour of the facility and the room in which I would be conducting the in-service sessions.

The second director stated that her staff needed the information I was presenting because it related to current issues in her facility. She informed me that she would select members from an entire shift, and they would not have the option to decline. I could expect 20 participants. She also said that this was her usual way of assigning staff to in-service sessions because she did not want to argue with her staff that some were able to attend and others not. She also noted that the only time that she changes this practice of

assigning staff to in-service sessions is when a governing body regulates training. She then makes arrangements for all staff of the designated department to receive the in-service session, no matter what shift they are working. This initial meeting lasted 40 minutes and included a tour of the classroom.

The third director explained that her procedure for informing her staff of in-service sessions was to post the information on the staff bulletin board. She believes this to be the most efficient method and that it gives her staff the opportunity to attend voluntarily. Staff members are responsible for arranging their own coverage if they are working and the in-service session is during their shift, or they are expected to attend on their own time. Her policy is that only those in-service sessions formally part of accreditation are mandatory. On these occasions, she requires her staff to attend and sets up a rotation whereby all staff have the opportunity to attend. Only these sessions required by the accrediting body are promoted verbally. The director said that I could expect three to five participants to attend my session. She stated that she has found that posting the information is a very adequate way of sharing information because her employees never come to her with questions or for further information. This initial meeting lasted 15 minutes, including a tour of the classroom.

At the end of each meeting with each director of care there was an agreed upon time, place, and date when I could present the in-service sessions, collect the pre-session questionnaire, and a request for situational examples of existing issues in the work place. Upon completing the personal interviews with each director, I wrote a follow-up letter to thank them and to confirm the purpose, objectives, expectations, and outline of each session in writing. Upon their request, I had no further formal contact with the directors

of care. I went to the facilities at the pre-arranged times and dates, collected the

questionnaires prior to the in-service sessions, and delivered the in-service sessions as

agreed.

Assessing Learning Needs of the Participants

It was evident after the initial meetings with the directors of care that I was not to

have personal contact with the staff prior to the sessions to determine their needs or begin

the process of establishing rapport. This meant I had only three sources of information on

learner needs: the pre-session instruments I had created, the feedback from the

administrators and supervisors, and my own experience. I include my personal

experience as a source of information because the majority of my decisions regarding

delivery and use of teaching strategies come from my own extensive experience and

education.

Nevertheless, involvement of the participants prior to the sessions was achieved

through the use of two instruments. The first was a 33-item questionnaire divided into

three sections. The three sections were: (a) the most important things that help me to

prepare for learning, (b) the most important things that help my learning during the

presentation, and (c) the most important things that help me with my ongoing learning.

The questions for each section were directly related to issues presented in the literature as

being important to learners before, during, and after learning (Caffarella 1995; Milheim

1994; Ottoson 1994). I hoped that the responses to these questions would validate what I

learned through reading regarding the prior involvement of participants, and would also

give me insight into the participants' needs. The directors of care agreed that I could

leave the questionnaires on the lunch room tables for staff to complete.

The second tool was a request for situational work examples, which I included with the questionnaire. I stated that I needed real work situations from them to use as examples during the in-service sessions. I asked the learners not to use the real names of anyone and to seal their answers in the envelopes provided. I indicated that both the pre-sessions questionnaires and examples would be picked up at a designated location. It was my goal to use the submitted scenarios so that the learning would be relevant, learners would have a sense of ownership of the content, and learners would feel heard because their examples were used.

My Overarching Design Decisions

My design decisions were based on Caffarella's Interactive Program Planning Model (1995). Garavaglia's Process Model (1993), Farquharson EDICT Teaching Methods Model (1995), and my own experience both as a health-care worker and educator. The adult education models are eclectic in nature, bringing together principles from the education and human resources literature. The first two models are based on similar principles. They begin by establishing a need, and recognizing the decisions and information required when creating a program. This information is the foundation for designing instruction, setting priorities, and making decisions for program delivery. The next stage is the delivery, and is based on specific goals set by the learners, the organization, and the facilitator. The final stage is the evaluation and follow-up process. The third model was chosen because my study focuses on observing the delivery of teaching strategies and because it was developed specifically for delivery within a health-care setting. I used this model to identify and apply my teaching methods in an effort to

enable a better critique. Farquharson's (1995) model is broken down from the acronym EDICT.

The letter E in the model stands for "explaining" the main ideas that will be presented to the learners. My method of delivery was to use a flip chart and to tell one relevant story or work example to illustrate how the content was to be applied. The letter D stands for "demonstrate." Here, the facilitator creates connections between the ideas presented and the events that occur in the learners' work places. During this step, I looked for opportunities to demonstrate the operational effects of the content. The next step is the letter I. which stands for "involvement." In this stage, I involved the participants by using short stories, quotations, and work scenarios within small group discussions. These were chosen to provide an opportunity for discussion, voicing opinions, and expressing values, biases, goals, and objectives. During this section, my chosen teaching method was to act as a facilitator of the process. I gave the power of the process to the learners so that they would take on the role of information sharers. The exercises were created in such a fashion as to actually have the learners use and apply their ideas, think of alternatives, and observe their co-workers so that the learners might decide to try new behaviors or acknowledge their present competencies.

Coaching is the next step in the EDICT process. I introduced coaching to the learners by having the small groups report back to the whole and discuss the ideas presented. During the reports from the small groups. I facilitated the process and recorded the answers. I also acted as the coach by posing critical questions to further stimulate discussion and bring forth other ideas. I incorporated coaching by bringing forward observations and using examples of what I heard within the groups as I circulated. This

method of involvement allowed me to model this behaviour and validate the learner's experiences.

The final phase is the T, which represents "testing, terminating and transferring." During this phase, I chose a didactic method of delivery in order to conclude the session. The conclusion began by asking a series of questions, reviewing the content, and writing the responses on the flip chart. I then handed out the transfer of learning exercise and the end of session evaluation form, and invited the participants to sign up for the post-session interviews with me in 3 months. This method of termination allowed me to be in control of the learning relationship that had been established, establish the pace at which closure would occur, and provide an opportunity for the learners to exit or close with me in a manner that was comfortable.

Using these models and my experience, I decided how I would attain my goals. I made five design decisions. The first was to focus on establishing rapport. The second was to challenge my facilitation skills by taking risks. The third was to challenge the learners, and the fourth was to use application as a strategy for delivering content. Finally, I needed to evaluate the extent of transfer of learning.

In my experience as an educator, I have learned that establishing rapport at the beginning of each in-service session is crucial. In this particular situation, the need was greater due to the short amount of time assigned for the sessions. Hence, the first decision was to make an effort to create a positive tone, mood, momentum, and rapport within the learning environment. I wanted the participants to walk into the room and know that their experience was going to be different from any other they had had in this same room before. I chose activities and developed each session with the goal of moving the learners

from a didactic experience to one of independent learning, self-reflection, and critical thinking. I believe that I achieved this by physically moving the furniture so that all seats would have a view of the flipchart in the front of the room. I greeted the learners at the door with a hand shake, personal welcome, extra paper, pencil, and handouts. I was punctual, wore warm colors, smiled, and used a low tone of voice when greeting them. I began each session with a clear outline of the process and my expectations. I stated that I was there to share information, not to act as an authority telling them what they are doing wrong or what they should be doing differently. I also gave them permission to leave if the presentation was not what they needed or expected.

The second decision was to challenge myself to take risks in how I chose to present the content to the learners. I examined my content critically and strove to make it as creative as possible. I wanted the content and my delivery style to get the attention of the learners quickly and to be presented in a manner that was relevant to them as individuals and as workers. Some of the techniques I incorporated to achieve risk taking included: (a) in Session 1, I chose to begin by inviting the learners to ask any questions they might have, then connect this to the content; (b) in Session 2, I greeted each participant with a hug as they entered the room; (c) in Session 2, I chose to teach and use juggling, as a way of demonstrating content; and (d) in Session 3, I asked the learners for their answers before I gave my own.

The third decision was to include exercises that might stimulate critical thinking and reflection. Assisting the learners to explore, identify, and possibly imagine alternatives regarding their assumptions in the 60 minutes available in each in-service session was indeed a challenge. I attempted to stimulate critical thinking and reflection

through the use of quotations and short stories. I chose the quotations and stories for their ability to stimulate discussion regarding the participants' work, no matter what their job, experience, or educational background. I typed one example, with defined questions, distributed one sheet to each member in the group, and then asked each group to assign a recorder who would then report back to the larger group.

The fourth design decision was to use the strategy of application of content as identified by Brookfield (1991). This was a way to increase critical thinking and reflection. I decided to stretch the boundaries by purposefully choosing soft skills content with the intention of getting a better sense as to whether the application strategy of storytelling did, in fact, have some impact. I hoped that learners would be able to transfer the information from the classroom to their particular situation and apply the content at work or at home. It was in this section that I incorporated the situational examples that were submitted by the learners.

The fifth design decision was with regard to evaluation and the measurement of transfer of learning. I had to articulate the issues I wanted to measure, then determine how I would collect the information, keeping in mind that the content and transfer of learning were difficult to quantify.

I distributed three questionnaires at different intervals. The first (described above) was the pre-session questionnaire. It was designed to elicit information from the learners prior to the in-service session regarding what helps them learn before, during, and after a learning experience. These were completed 1 to 2 weeks prior to attending the sessions. The second instrument was a post-session questionnaire. The questions focussed on three variables: (a) the facilitator, (b) the learning environment, and (c) the learners'

experience. There were eight questions soliciting the learners' impression regarding the performance of the facilitator, five questions regarding their experience in the learning environment, and eight questions soliciting opinions about their learning experience. Of these 21 questions, 5 were written negatively to discourage the learners from checking only the most positive answer before reading the entire question. The final measurement was an interview schedule for use with volunteer learners 3 months after the in-service sessions. This instrument focused on the concept of transfer of learning. It asked whether learners had actually used the content of problem solving, motivation, and caring. My expectation was that the learners would build on the content knowledge relevant to their jobs. This would be seen if the learners were able to articulate that they solved problems. changed an approach to their work teams, viewed their roles differently, reflected and passed on the information they learned to someone else, or experienced an attitudinal change.

Strategies for Promoting a Positive Learning Environment

The strategies used for developing a positive learning environment were based on four conditions. These conditions were the physical setting, long term care facility climate, obstacles to learning, and facilitator personality.

Physical Setting

The physical setting was a variable that I manipulated. Before each session, I moved the furniture to create a room that focussed attention to the front. This reflected a sense of order and enabled the learners to move into small groups easily. I also created the expectation that learners had a responsibility to participate and that learning would

occur. I accomplished this by handing out paper and pencils to the learners as they entered the room.

Climate

My assessment of the climate within the long-term care facilities was based on fact and personal observation. All three facilities were in the process of union negotiations and a strike was a very real possibility. When interviewing two of the directors. I did not get the impression that the negotiations would have an effect on the learning interventions. However, the third director stated that there was tension between management and the rest of the staff over contract issues. She then quickly stated that this tension would not interfere with attendance at my sessions as she would direct everyone on the shift to attend because they needed the information to do their jobs more effectively.

I was further able to sense the climate when I took individual tours of each facility with the director after completing the initial interviews. These observations played a role in my decisions and affected how I created the learning environment. In Facility A. I observed the director being greeted in a friendly manner. I saw cheerful staff and saw discussions among the staff going on with an air of friendliness or camaraderie. At Facility B, I observed no acknowledgement of the director, little staff interaction. an air of formality, and felt excessive scrutiny from the workers as we walked through. In Facility C. I observed formal acknowledgement of the director. little staff interaction. a sense of urgency to complete the work. and a cold, business-like atmosphere.

Obstacles

I acknowledged several obstacles and attempted to compensate for them within the in-service sessions. These obstacles included freedom of choice to participate, tension or stress learners had regarding their work, and the expectation of change. Each one of these issues presented itself very early in the in-service sessions. As a facilitator, and as a learner, I know first-hand the negative emotions, tension, and loss of concentration that occurs when learners are mandated to participate. Loss of choice in such situations can have a very negative effect. Therefore, after reviewing the outlines and expectations, I offered the learners the option to leave if this in-service session was not of interest, or did not appear to meet their needs. Even though this may have been seen as a token gesture, I believed that giving permission to leave was an effective way to recognize and empower learners and to dissipate some of the negativity that came into the in-service session with the learners. The second issue was the mood within the facilities. As I toured each facility, I experienced different moods within the working environments. Different degrees of tension and stress were visible. Within the in-service sessions, I attempted to address this by being welcoming, non-threatening, encouraging, and suggesting that this in-service session was going to be different than others they had attended in the past. The final obstacle was change. I was aware of Wlodkowski (1999) and Knowles' (1980) statement that adult learners are more resistant to change than children, and that this resistance may increase tension within the learners and reduce the learning that occurs. I attempted to address this by acknowledging the skill level of the participants during discussions, having them compliment themselves by identifying their strengths as caring and motivated problem solvers and inviting them to list ways they could improve their

skill levels. Therefore, suggestions for change came from the learners themselves, rather than from me, the perceived expert.

Facilitator Personality

My personality as the facilitator played a significant role in the nature of the tone and momentum within the environment. As an individual. I am positive, optimistic, creative, energetic, and focussed. I have been complimented on my ability to enter a room, scan the audience, and know how to involve the entire group and facilitate a change in the mood to get information across. I believe that this strength comes from my personality as well as my ability to assimilate my learning, past experience, and intuition. As discussed later, in order to connect with the learners within this environment. I chose to take personal risks to expose my own identity, strengths, and weaknesses. I believe that my confidence and strong personality traits contributed to the supportive learning environment during the beginning, middle, and end of the in-service sessions.

Strategies and Instructional Methods for Transfer of Learning

In examining the variables that affect transfer of learning, I chose four variables that I intended to influence. These variables were the content, the environment, the participant, and the facilitator. The following is an explanation of the strategies and good practice teaching methods I implemented to affect each of these variables.

Content Variable

I implemented four specific transfer of learning strategies to assist learners to explore the topics presented further. These strategies were: (a) homework assignments, (b) letter of commitment, (c) repetition of content, and (d) creation of expectation. These were selected on the basis of recommendations in the literature.

I created homework assignments and distributed them as optional activities for the learners to take with them at the end of the sessions. I presented these assignments as opportunities to further explore their thinking about what they had heard and experienced during the in-service session.

I distributed the commitment letter at the end of each session as an exercise for the learners to express what they had learned. I created a commitment form letter that contained four reflective questions for the learners to answer. When the learners had completed the letter, I asked them to seal it in the envelope provided and to address it to themselves. I stated that I would mail the letter to them in approximately 4 weeks. This letter was intended to act as a stimulus for review, an opportunity to further commit to self-exploration or change, and an avenue to encourage self-reflection. One learner commented on the commitment letter during the post evaluation: "I felt silly writing the letter to myself and I was sure that I would not see it again. When the letter came to me I was surprised; I read it and felt embarrassed because it was so personal. Writing this letter was very powerful; lots of feeling in this process for me."

Another strategy I used was repetition. During each session I encouraged participation through the questions I asked, and by responding to learner questions. I recorded answers on the flip chart. This method of encouraging questions and physically recording the information was the foundation for sharing, repeating, and processing information. I also presented information and repeated the important points in different contexts with the goal of encouraging critical thinking. Using the strategy of ongoing questioning and discussion was also a way for me to get feedback and to gage their understanding of the content. One learner commented, "I appreciated what you did to

increase my confidence. You did this by coming back to the same points but worded differently, you asked questions, gave people a chance to talk, allowed me to voice my opinion, and then you commented."

The final transfer of learning strategy I incorporated as part of the content was to set the tone that I expected participation from them as learners. I wanted the learners to experience an immediate sense of expectation as they entered. This in-service session was not one where they could pass the time away from their work. To set this tone I distributed pencils and paper to each participant as they entered the room. If they stated that they did not need the supplies, I replied that they should take them anyway just in case they changed their mind. I wanted to send a clear message as they entered that this experience was going to be different from others they had experienced in this room previously.

Some of the written comments I received from the post-session evaluation were: "Thanks for the challenge to get involved at the beginning." Another learner wrote, "When you gave me the paper and pencil I was afraid and the thought crossed my mind to leave. Then I said to myself no, I am going to learn something today, and I did not leave disappointed." Two examples from the 3-month follow-up interviews also indicate that my approach to the beginning of the session set up the desired tone: (a)"I felt comfortable quickly; you gave me choices, I could take notes or not. I felt relaxed, sat back, and said this is going to be okay. Your objectives were like those on an agenda. Helped my brain focus." and (b) "I was comfortable quickly at the beginning, you were lively, open, you got me thinking quickly. I knew what we were going to talk about and I knew you expected us to participate."

Environment Variable

From my reading of the adult education literature I know that, as a facilitator, I would have little influence upon the dynamics or politics of the work environment, or on the physical space assigned to me for the delivery. I could only use suggested instructional methods to affect the atmosphere in the in-service session. Following are the methods from the adult education literature I used with the intention of influencing the environment as a variable: (a) establishing rapport, including credibility and trust; (b) creating a learning atmosphere in which the participants felt comfortable contributing to the discussion and asking questions; (c) creating an atmosphere where the participants felt that their needs were being addressed, that the content was tailored to their situation and not solely discussed at an abstract level; (d) creating a tone of presentation that was interesting and challenging for the participants; and (e) moving the tables and chairs so that there was a surface available to write on to increase the comfort level and provide formal structure to the room. One learner's comment regarding the environment was: "I was comfortable very quickly, you talked about yourself, you are a nice person, you talked to us, not at us, you let your nice feelings show. I was not afraid to speak up to say what I thought. I knew what you expected and what we were going to talk about."

Participant as a Variable

The learner is the purpose and focus for an educational intervention. Therefore, the learner's needs ought to be taken into account in planning. Two things I did in an attempt to determine the need from the learners were to create the pre-session questionnaire, and to design the handout requesting situational examples from their work. To involve the learners in their learning, I created learning opportunities within both

small and large groups discussions. Whenever possible, I incorporated relevant work examples in presenting the content and in the discussion. I ended each session with a review of the content and shared written lists of practical things the participants could do on the job to help them use the new information they had learned or to act as reminders of the things they already do.

Facilitator as a Variable

I knew from my contact with the directors of care that they expected me to present information to their staff. I had the impression that they would be pleased if their staff did indeed learn something useful; however, I also got the feeling that learning was not really expected. My intention was not to be solely a messenger of information. My goal was to achieve maximum interaction and to stimulate ideas and thoughts with the learners. I attempted to do this by using recommended instructional methods from the adult education literature.

The first method I used was connected to my appearance and style of presentation. From my reading and personal experience I believed it was necessary to present an image that was balanced between being a professional and a peer. I wanted to engage with them, not dominate them. As the facilitator, I worked hard at presenting an image of being open, honest, and willing to listen to their opinions. To do this, I chose to use body posture, tone of voice, and language which suggested openness and friendliness.

The second method I used was to vary the pace and energy during each session. I physically moved around the room, varied the tempo of my speech, asked questions randomly of the learners, used the flip chart, and had the large group break into small work groups to process the content presented. During this time I also paid attention to the

learners' body language, level of participation, and articulation of the concepts. A component of pacing was my flexibility in presentation style. I repeated content or moved on, depending on the feedback from the learners. A final factor included in pace and energy was that I used my own energy and motivation as a presentation tool. I presented myself as genuine, enthusiastic, knowledgeable, and confident regarding the topic and my role as the facilitator. I made myself available for questions and comments after the presentation. I also endeavored to accept criticism during the sessions without becoming defensive.

Another method I used was to design the content carefully to avoid overloading the participants with information. I accomplished this by presenting the concepts in smaller blocks of information and using the flip charts and handouts only as a means for distributing the content. I ended each session with an opportunity to review what they had learned. Whenever possible, I used analogies to encourage critical thinking. Finally, to assist me in staying focussed, I created and followed detailed outline and presentation notes.

Structure and Delivery of the Sessions

In the following subsection, I describe the delivery process for the in-service sessions. I conceptualized each session in four phases. The four phases were (a) establish rapport, (b) present content, (c) use small group activity, and (d) review, questions and transfer of learning exercises. The topics for the three sessions were: (a) Problem Solving: How I solve problems and how I can be a better problem solver, (b) Motivation: How I motivate myself to do the excellent work that I do, and (c) Caring: Why I care and what caring really is.

Session Set-up

Each session followed a strict time schedule. This schedule was to assist in my time management, to help me be consistent when delivering the same content repeatedly, and to set strict content parameters so I would not overload the learners with information. All the sessions were scheduled to be one hour in length and to consist of four phases. The first 10 minutes were used to establish rapport, review the outline, and introduce the content. I used high-risk activities to stimulate involvement during this phase. I designated the following 15 minutes for the presentation of the content as the facilitator. The next 25 minutes were set aside for the learners to experience the small group activity and debrief the outcomes. The final 10 minute phase was for review, questions, explanation of the research, distribution of the transfer of learning exercise, concluding remarks, and distribution of the end-of-session evaluations.

Although the structure of the sessions remained the same, I varied my intent and approach within each of the phases slightly. I chose to change the momentum of each phase subtly to increase the control given to the participants. As I was progressively increasing the demand for them to think critically and reflect, I was also decreasing my perceived role as a didactic teacher.

Throughout these phases, part of the implementation plan was to pay attention to my physical presentation. I chose my attire carefully, selecting clothes that were casual and professional. I lowered my tone of voice and used an approach that was welcoming and pleasant to each participant as they entered the room. I methodically planned my actions and made a conscious effort not to present myself as an authority figure. Upon introducing the sessions and myself, I made it clear that I did not have all the answers and

that I could only speak from my learning and experience. I began each session thanking and honoring the participants for their attention, recognizing them as experts, and stating that the purpose of these in-service sessions was to help them acknowledge their work and to practice some skills. I was there to stimulate discussion about their work. We would talk about which strategies worked, which ones did not, and why. In the following subsection, I describe the delivery process for each of the four phases.

Phase 1. Establishing Rapport

I had set out to take some personal risks in these sessions. The high risk activity I chose for Session I was intended to demystify my role as an expert and to present myself as a co-learner. I chose not to introduce myself in a traditional way. I gave the participants the opportunity to ask me any personal questions they wished, and I said I would reply openly. I was striving to share power with participants by presenting myself as a real person, and not as a distant authority figure. I explained that I was there to share information and stimulate discussion. I was not there with all the answers, nor to tell them what to do. After the introduction exercise and review of the outline, I offered them the choice to leave if they felt the presentation was not going to meet their needs or expectations. My intention was to empower the participants by giving them a choice since they had not had the opportunity to participate in selecting the content, and some were not given a choice of whether or not to attend. I believed I needed to do this for a number of reasons: (a) to quickly get their attention, (b) to increase their comfort level, (c) to establish relationship and rapport, (d) to give the message that this in-service session was not going to be like other experiences they had had before in this environment, (e) to create an expectation of participation, (f) to start the participants

questioning, thinking, and wondering what was going to happen next, and (g) to give them some control in an environment where they would ordinarily have little control. A sample of comments from the participants during the post evaluation process concerning this first phase is as follows: "I liked the way you talked to us, down to earth, natural, not trying to put something on." "You said I didn't have to remember everything. That made me feel good, I relaxed. I get nervous that I have to remember everything." "I liked the flip chart. It was good to see it while you talked. Your smile is something I remember, you looked relaxed so I was relaxed."

Phase 2, Content Presentation

I began this phase with a discussion about the learners' comfort level regarding my method of introduction and whether this could be identified as a problem. The discussion was then taken further to acknowledge ourselves as individuals who experience things differently because of our values, ideas, and personalities. When working with others we have to understand our own behaviours in problem solving as well as have an understanding of others. This led into my presentation of De Bono's Six Hats of Thinking (1986) and the Skill Path (1993) content on the different ways of reacting to problems. After completing the formal content, I presented relevant work examples to assist the participants in the transition from an abstract frame of reference to a concrete understanding. A representation of the comments from the post evaluation included: "I really remember the hats and the grocery store example; I realized how different we all are and how you can even get something out of a person who is negative." "I committed to using the hats in understanding and working with the residents and it did help."

Phase 3. Small Group Activities

I used small group discussion to help the participants apply and reflect on the content that had been presented. I distributed four situational problems that had been submitted to me, with four questions for learners to discuss in small groups and report back to the group as a whole. I expected there to be many ways of identifying whose problem it was as well as a variety of ways of dealing with the situations. This would become evident in the debriefing. It was my hope that the participants would continue to think about these problems long after the in-service session. After the debriefing, we brainstormed strategies for successful problem solving. I recorded all of their strategies on the flip chart. I believed that because these strategies came from the learners, they would use and report them during the post-session interviews.

Phase 4. Review, Questions, and Transfer of Learning Exercises

For consistency, Phase 4 was identical in all three sessions. I knew that the review and closure of educational sessions are transition points where memories, mood, or emotions are carried with the learners for a period of time. To connect with the transfer of learning exercise, and to assist in a quick and consistent closure, I asked the question: What have you learned today? I then recorded the answers on the flip chart. The transfer of learning exercise was to write a letter to himself or herself about their learning, acknowledging what they presently do well, and what they plan to do differently. I collected the completed letters in sealed self-addressed envelopes and told the participants that I would mail the letters back to them in 3 weeks as a reminder of their learning. Some participants chose to write the letters at home and to return them in a designated envelope at the front desk of the facility. This transfer of learning exercise

closed the in-service session and re-enforced the message that the participants are the ones with the power to make choices and decisions regarding their learning.

Evaluation and Results

I created three evaluation instruments. The first was the pre-session questionnaire that I used for assessing the participants' needs. A pre-session questionnaire was designed for each topic area. Therefore, there was a potential of 197 responses if each of the 62 participants completed a questionnaire for each session they attended. The second evaluation tool was the end-of-session questionnaire developed to get immediate feedback from the participants at the end of each in-service session. From the attendance records kept, I knew there were 197 responses possible. The third instrument was an interview schedule that I prepared for follow-up interviews with volunteer participants 3 months after the last session. However, since only participants from two facilities (Facility A and C) chose to be involved, the pool of volunteers for the follow-up interviews was reduced to 41. This third instrument was created to assess the transfer of learning. In the final section of this thesis, I briefly report on specific transfer of learning outcomes that were documented in the 3-month follow-up interviews.

Pre-Session Questionnaire

The purpose of the pre-session questionnaire was to elicit information from the learners prior to the session, to help me design a better in-service session, and to start the process of thinking for the participant prior to the session. The pre-session questionnaire was divided into three sections in order to explore issues important to the learner in: (a) preparing for a learning experience, (b) participating during a learning experience, and (c) continuing learning after a learning experience. The questions created in Section 1

were written to elicit information regarding the physical environment in which the learning would occur. The questions in Section 2 were written to explore the expectations of the participant prior to the intervention, and to get a sense as to their reason for attending the in-service sessions. The questions in Section 3 were designed to address issues around activities that occur after a learning experience and strategies that encouraged the practice and use of learned information.

There were 112 pre-session questionnaires completed. The tabulated results were very consistent. Only one question, "The most important thing that helps my learning is not comparing myself to others," received an average percentage below 75% as being *important or somewhat important*. The other questions were answered with percentage rates between 80 and 90% as *important or somewhat important*. The nine participants in the follow-up interviews stated that the pre-session questionnaire had no impact on them. The participants said they did not think of the information after completing it, nor did they feel there was any connection with the sessions they would be attending. One participant did say that she found the questionnaire very interesting to complete, and that it made her wonder about me, and thought I would be an effective presenter because of the stimulating questions.

End-of-Session Questionnaire

The purpose for creating the end of session evaluation was to receive immediate feedback on the learning experience, and get learners' impressions of the facilitator, and comments regarding the delivery of the content. The questionnaire was composed of 21 questions divided into three categories. These categories focussed on three variables: the learner, the environment, and the facilitator. The variable questions were intermixed, and

5 of the 21 questions were worded negatively to discourage responder bias. The questions were worded with the intent to encourage the learners to reflect about their own experience. The questionnaire also included a section for the learners to add any extra comments that they wanted to make.

There were 130 end-of-session questionnaires completed. The tabulated results were very consistent. On the questions soliciting feedback regarding the environment as a variable, 92% answered that they *strongly agree* or *agree* that it was an expression of their experience. For questions soliciting feedback regarding their learning as a variable, 80% answered that they *strongly agree* or *agree* that the statements were true for them. Finally, questions soliciting feedback regarding the facilitator's skill level revealed that 94% answered that they *strongly agree* or *agree* that the facilitator was highly skilled. Of the 130 returned questionnaires, only 4 participants marked everything very positively, not recognizing there were negatively worded questions.

Follow-Up Interview Questionnaire

At the end of each in-service session I invited the participants to have a coffee and conversation with me 3 months from that particular date about their experiences. I briefly explained my intentions and purpose for the follow-up interview. In total, 9 of the 62 participants volunteered for the follow-up interviews. These volunteers represented 2 of the 3 facilities. It is difficult for me to interpret the lack of participation from one of the facilities. I can only speculate that non participation is connected to the negative atmosphere that I had previously sensed during my initial tour, or, the inattentive behavior on the part of some of the participants during the sessions. It may have been that the political tension that the DOC had alluded to earlier, was indeed affecting

participation. The participants who did choose to be part of the post-interviews each gave me their telephone number at the end of the session in which they decided to participate. When I called to confirm appointments for this follow-up process 3 months later, all 9 remembered me and were expecting my telephone call.

The questions were grouped into three categories. The first category focussed on gathering general information. It was designed to decrease the stress of the interview and establish a comfortable atmosphere for conversation. After the factual information was gathered. I asked one open-ended question to begin the process of recall. This first question was crucial to the issue of transfer of learning because that is where I expected the learners to indicate what they genuinely remembered and used. I was careful not to ask questions that may have been leading. The next section of questions focussed attention on the pre-session questionnaire. The final section focussed on recall and the use of the content information presented during the sessions.

Transfer of Learning Outcomes

The following section focuses on the last stage of transfer of learning and process outcomes. There are three subsections describing the transfer of learning. The first concerns changes in confidence. reflection, and levels of discussion. The second describes changes in approaches. and the third concerns use of content information and subsequent expression of changes in behaviour. The discussion of process outcomes is divided into three subsections: sense of rapport established. risk-taking activities remembered. and differences in participants' approaches.

Increasing Confidence, Reflection, and Discussion

All nine of the participants reported they had enhanced their levels of reflection,

experienced an increase in discussion on the job, and had experienced an increase in self-

confidence. They also cited examples of observable growth in themselves and others

around them as a result. This was documented during the 3-month follow up interviews.

Some of the participant statements confirmed that their objectives had been achieved.

One participant commented, "All of the sessions left me feeling more confident. The

things you said reinforced the things I believe in and do. I felt validated and had more

energy to go to work." Another participant stated, "I left feeling I had grown, learned

something. I was impressed with you." A third participant said:

> The impact of the ideas on me was incredible. It validated my attitudes, helped me
> to value relationships. I talked to at least a dozen people at work about the
> content. Then at home I talked to eight people who are close to me, anywhere
> from 10 minutes to an hour. I was empowered with the new understanding of
> information.

These changes are now discussed in more detail.

Changes in Approach

I strove to assist the participants in the learning process to increase their

knowledge and to challenge their perspectives. I did this by using content knowledge that

was relevant to their work. Verification of effectiveness came from the responses within

the post-session interviews. One participant said:

> A couple of the girls there with me have a personality conflict. They always
> complain about each other while I work with them. I do not like that. We learned
> that we need to listen to each other and be positive. We made an agreement that if
> one said something negative we would use a code word to the other to stop it.
> And if that person did not get it we would explain it. It worked well and we had
> some good discussions.

Another participant stated, "I was able to attempt to see the residents in a different light. It was very positive and worthwhile learning experience. I used the problem-solving strategies for reporting at work. It felt okay taking the risk." A third reported:

> The togetherness that was created afterwards was very good. I talked to people in the lunchroom and at coffee about what we learned. Some of these people I work with all the time and others I never talk to in other departments. We understood things at a different level and this was very good.

The second approach I was striving to assist the participants to achieve was to use the information that was presented. An example that participants did take the information and use it is recorded through responses given during the follow-up interviews. One participant said, "The in-services helped me to see situations differently, see others' motives, helped me to analyze a situation, and not jump to conclusions. Remembering to take time to listen, and to be real when caring -- you can't fake it." A second participant added, "The hats were very useful, once you realize something and understand it at another level, things change positively." A third said, "There were many things I used. One that had the most impact was setting goals together. The problem solving was very useful."

Use of Content Information and Behaviours

It is often difficult for educators to verify whether the participants leave the learning environment with an understanding of when and why to apply their new learning. I documented two situations in my journal that indicated participants transferred their learning to the work place The director of care from Facility A heard my voice in the hallway and came up to me to say:

> I am impressed. My staff are using what they learned this week. We were in a meeting discussing a serious issue and there were a great number of differences of opinion as to how we should deal with the situation. Then one staff member said,

"We need to pay attention to what that lady told us at the in-service. There are a lot of ideas going on here, we need to pay attention to these and deal with the issue, the facts, and to own our own stuff."

The director of care went on to say that this type of participation or direct discussion from an in-service session had never occurred before and that she was amazed at how well her staff dealt with the issue after. Another unsolicited response came from a supervisor in the housekeeping department from Facility A just before the third presentation. She sat beside me while I was waiting for the room to be set up for the session. She began by apologizing that she was unable to attend any of the sessions and was feeling left out because her staff had benefited so much. "My staff have not only enjoyed your talks but have used the information. It has stimulated lots of discussion while they work. I have never noticed this before from an in-service session. I am very impressed to see my staff enjoy and use information with such confidence."

Process Outcomes

I defined these outcomes in the context of behaviours and settings and hoped that participants would apply their newly acquired knowledge, skills, or attitudes. Some of the behaviours that I thought might be articulated included: an increase in confidence, ability to identify client needs differently or more effectively, co-operation with other staff, recognition of self and their skill level, enthusiasm, and commitment to work. The result of the post-session interviews with the nine who participated illustrated that they not only processed the information, but also identified what they needed to do differently and changed their behaviour accordingly. Of the nine post interviewees, all nine reported an increase in confidence and use of at least 1 skill. Seven of the nine stated that they were able to see their co-workers or residents differently. This enabled them to work better and

feel more committed to their work. Three of the participants gave concrete examples of how they had improved their problem-solving skills both at home and at work. Eight gave examples of how they shared what they had learned with other co-workers, friends, and family. Evidence of an attitudinal change that I documented in my journal concerned a supervisor's observation of her staff. As she stated to me: "It has helped morale. People are looking out for each other more. They seem to be more confident, connected, and appreciative of each other." This statement seems significant since it was made in an unsolicited manner by a supervisor one week after I delivered that session. However, the degree of significance is difficult to judge, due to a lack of detailed information.

The following participant comments are from the nine individuals who participated in the post- session interviews. The comments of one participant expressed during her interview reinforced the fact that an attitudinal change had occurred. "You helped me feel more confident, helped me to acknowledge that the little things I do make a difference." Another participant recalled, "I was surprised that people heard the same story and had so many different interpretations. It helps me to understand things. I now appreciate other people's opinions more."

Sense of Rapport

Establishing rapport is key in establishing relationships. It is not tangible and is therefore difficult to measure. Yet, it is crucial in the teacher-learner relationship. When I conducted the 3-month follow-up interviews, I attempted to establish whether rapport was indeed achieved. I began the interview by stating, "Before I begin to ask my questions and this interview process formally, sit back and just tell me what you

remember." To my surprise this question solicited nine responses suggesting that rapport was established.

A common theme of the responses is represented in the quotation below:

I was comfortable from the beginning. You introduced yourself, we asked questions that got the ball rolling and you made us all think. I liked the way you talked to us, 'down to earth', natural, not trying to put something on.

Some of the participants emphasized their appreciation for having been given permission to leave the in-service session. Others commented on the physical set up of the room as having been important to them. Some reflected on my lively personality and how that encouraged them to pay more attention and get involved. All nine of the participants expressed appreciation for the clarity at the beginning of each session. They said that it helped to know quickly what was going to happen in the hour and what was expected of them. Finally, all nine remembered me personally and used some specific words to describe my personality. It was also evident by their responses to my telephone calls to set up the appointments for these interviews that all were eager to participate in the interview process so that they could help me. They said they were participating in the interview process because of the relationship that was established and not due to a feeling of responsibility or duty to participate. A comment from a participant that reflects this opinion is: "I had a note on the calendar to remind me of when three months was up so I would have an idea of when you were going to call. I wanted to meet with you because I enjoyed your presentations and your company. I felt like you were my friend and I was looking forward to your visit."

of the learners quickly, and I was able to create a stimulating and energetic tone for the sessions.

Difference in Approach Surprised Participants

I implemented two strategies in an attempt to stimulate both critical thinking and reflection. These were the small-group discussion and the distribution of the commitment letters with the specific intention of creating an opportunity for thinking. Both of these strategies were remembered to different degrees by all nine of the participants. All commented, both favorably and unfavorably, on the commitment letter, yet admitted that the process made them think. Those who completed the task said they appreciated the exercise and would do it again. Others who did not follow through with all of the instructions nevertheless noted the importance of the exercise, and added some explanation as to why they chose not to follow through completely. All nine were very complimentary of the group discussion exercises and were often surprised at the different opinions that arose in them. The participants were not expecting such differences of opinions when interpreting the same situation. It was interesting to hear how the individuals used the information differently to meet their own needs. This was very rewarding for me as the facilitator, for it was an indication that they grasped the concept and applied the information to their own situation. As one said: "The commitment letter made me stop and think. The word commitment scared me. I decided to do it to get in touch with what I want. I wrote it but did not hand it in to be mailed. I still remember what I wrote. I would do it again but this time put my heart into it."

Although rapport, risk taking, increasing confidence, reflection, and changing of approach towards their work were not measured as concrete behavioural changes, several

of the participants' responses indicated that they went through a process of questioning, exploring assumptions, and analyzing their present way of knowing or behaving in the classroom, at work, and at home. They also reflected upon their performance at work and how, as individuals, they are part of the whole and why some chose to approach their work differently. In the following chapter, I discuss the process and outcomes of my study in relation to the literature.

CHAPTER 4

DISCUSSION, CONCLUSIONS, AND RECOMMENDATIONS

The purpose of this study was to incorporate good practice facilitation skills in an

adult education context. Specifically, it was to examine the links among the facilitator,

the participant, and the environment with the goal of achieving transfer of learning. In the

context of these variables, factors were identified that affected all learning environments

involved. In this chapter, I review the factors that influenced transfer of learning both

from the perspective of the participants and the facilitator in the teaching-learning

exchange. I then discuss the findings in relation to relevant adult education literature

discussed in chapter 2. I also discuss the usefulness of decisions made during the

facilitation process using good practice instructional methods and the use of the four

transfer of learning strategies. Then, I examine my own learning during the study. Based

on this discussion, I draw conclusions and offer recommendations for adult educators

who provide similar in-service sessions.

Identifying Factors That Influenced the Transfer of Learning

Although there is an established body of literature in the field of adult education

that examines ways to promote the transfer of learning (Caffarella, 1994; Ottoson, 1995;

Tallman & Holt, 1987), it focuses mainly on formal educational classrooms. In contrast,

my study was carried out within a health-care facility through in-service sessions. I chose

four identified factors from the adult education literature that were consistently cited as

being essential to all learning environments. These were: (a) including choice and

providing support. (b) informing learners. (c) allowing time for thinking, reflection, and

incorporation of past experience, and (d) taking risks. In the following section I review

the incorporation of these factors and their influence on transfer of learning.

Issues of Choice and Support for Participants

Adults value choice and opportunities for support when making decisions. This

desire or need does not diminish in a learning environment. As Wlodkowski (1999)

points out. "Resistance often comes up because the learning experience is required or

because people believe they have been unfairly mandated to attend" (p. 131). He notes

that when learners are required to attend programs, facilitators need to emphasize

immediate relevance and choice for them. Wlodkowski connects the need for relevance

and choice to motivation. He believes that learners are curious and seek out challenges.

which leads to interest. emotional growth. and a positive attitude towards learning. With

relevance and choice. learners are more likely to follow their interest and participate in

whatever involves or interests them.

As reported in the data from the follow-up interviews in my study. participants

remarked that I did indeed give them choices. One participant observed: "You began very

clearly stating what was going to happen and what you expected. You even gave us

permission to leave if this was not what we wanted. This all helped me to understand why

you were here trying to teach us something." This participant's statement verifies the

need for clear objectives. relevance. and choice as suggested by Wlodkowski (1999). In

my study I chose several methods to establish choice and support at the beginning of the

sessions. I greeted the participants at the door with a hand shake, gave everyone a pencil

and paper. began with a short introductory exercise. presented a clear outline and plan for

the hour, and finally offered the option to leave if the session was not what they expected or needed.

Caffarella (1994) identifies the need for supervisors and managers to support their staff when in-service sessions are offered. Caffarella suggests that supervisors need to be involved in the entire process of development, delivery, and follow-up of educational interventions because this increases the degree of transfer of learning. In my study, I observed and documented different levels of participation between the supervisors and managers in the three facilities. However, I also observed several similarities among the three facilities. These were that: (a) all three were in contract negotiations, (b) all were experiencing staff morale issues as identified by the directors of care, (c) all had similar work conditions, including staff complements, work hours, and workload. In view of these similarities, I assumed that the difference documented in my field notes between the facilities was due to the different levels of support and choice that the participants experienced.

As discussed in chapter 3, Facility B had the least amount of choice and support, as reported by the participants. Following are the differences specifically for Facility B that I was able to document in my field notes: half of the participants completed the post session evaluation after Session 1, and this increased to 80% for Session 2, and 85%, for Session 3; no submissions of letters of commitment were received until Session 3 when 5 were submitted out of a total of 19 participant; and there was no participation in the post-session interviews from those in Facility B. During the sessions, the participants from Facility B were more distracted and not as co-operative as those from Facilities A and C. Small group discussions were shorter in duration and no spontaneous questions or

reflections were stimulated among this group. This behavior is consistent with the literature (Baldwin & Ford, 1988; Caffarella, 1994; Parry, 1990b; Tallman & Holt, 1987) which stresses the need for support from key leaders and superiors. Because of their non-participation in the post-interview interviews, I did not have the opportunity to ask the participants of Facility B how supported they felt regarding their attendance and participation in the sessions. One interesting note is that by Session 3, the participants from Facility B were more involved and cooperative in general. Because I was not able to talk to any of the participants after the session, I can only speculate that the differences in this group's participation occurred due to changes in group dynamics as the sessions progressed. Some of the reasons might have been due to the participants beginning to establish rapport, feeling they had a choice to participate within the session, experiencing a feeling of support from others in the group to participate, and recognizing relevance of the content.

Knowles (1980) and Wlodkowski (1999) both speak of the links among motivation, choice, participation, and consequences in performance or non-performance. Their belief is that motivation operates with multiple thoughts and feeling occurring simultaneously. Wlodkowski states that "it is difficult to feel responsible unless one has choice to hold oneself accountable for" (p. 13). This non-compliance may have been a small way for the participants to express a need, or to rebel. It seems that the participants voiced more to me by not participating than they would have by participating. Non-participation raises questions about job satisfaction, the influence of choice and non-compliance, demonstrated attitudes of the participants, and a conscious or unconscious expression of dissatisfaction concerning work elements beyond this study.

An observation regarding the participation from the other two facilities is that, in Facility A, the director of care not only gave participants a choice to participate, she stipulated that I provide two sessions per presentation to allow maximum opportunities for her staff to participate. The participants from this facility were the most interactive and focussed of the three facilities. They demonstrated reflection and critical thinking, completed the commitment letters after each session; some participants attempted all of the exercises distributed as homework and both the supervisors and the director of care gave spontaneous, unsolicited feedback to the facilitator. Facility C had the lowest participant attendance. Although they were given a choice to participate, they did not report receiving direct support from the director or immediate supervisors. The four participants from this facility were engaged and participated in what they felt comfortable doing. However, there was no spontaneous feedback from supervisors or director of care, participation was adequate to conduct the group, and only one participant chose to take the homework exercises.

Due to the speculative nature of this discussion, it is difficult to come to specific conclusions regarding support. One reason is that following the sessions I was not able to speak with representatives from all three facilities. Second, my sample size was small. Third, I did not clearly define the term "support" for the participants. I believe that some of the participants interpreted support as meaning being informed of the facts and not as encouragement or discussion from their superiors.

Informed Participants

I was very aware that the adult participants in each of the three facilities were in need of very specific information. As Tallman and Holt (1987) point out, learners need to

be mentally prepared for an educational event. Without information prior to learning,

adult learners may experience apathy, a reduction in participation, or the learning may

increase their tension. With prior information, individuals can make choices about

whether the activity is relevant, of interest, or whether they are apt to feel included. Being

informed is also connected to feeling supported as a participant.

Vella (1994) speaks of the importance of identifying what is to be learned so that

learners are able to recognize immediate usefulness. She notes that "most adults do not

have time to waste" (p. 16). When individuals are involved and informed about an

activity they are more likely to be interested, want to invest some energy, and be

motivated to participate. In this study, administrators at all three facilities informed their

staff in the same way. They all used a poster and sign-up sheet. Yet, the response from all

nine post-session participants was that they felt informed. From my perspective as the

facilitator, I found it hard to understand how they felt informed about the sessions from

the scanty information posted on the bulletin boards. My speculation is that because this

is the usual procedure for disseminating information, the staff felt informed in this

context.

Contrary to the findings in the literature (e.g., Parry, 1990a), the participants in

my study showed little need for the support of management. The pre-session

questionnaire and the responses from all nine respondents of the post-session interviews

underline this observation. Of the 112 pre-session questionnaires that were returned, 72%

stated that it was neither important nor unimportant for them to know that their supervisor

supported their attendance, or to know what the facilitator was going to talk about. The

post-interview respondents stated they were as informed as they are before attending any

in-service session. They stated that if they needed more information they would ask someone. However, they usually got what they needed from the poster information. This may be an anomaly for health-care workers due to the nature and structure of the organization. Staff members attend in-service sessions as part of their jobs or routines, and they may not view these in-service sessions as part of their educational plans. Also, if they are not regularly asked to be involved or to participate in the development process, staff members may not expect to have any more information or support at these facilities.

Time for Thinking, Reflecting, and Incorporating Past Experiences

According to MacKeracher (1996), "Learning is facilitated when time and opportunities are provided to reflect on past experience, to find connections between past experience and new knowledge and skills, and to integrate these" (p. 41). Having only one hour for the presentations forced me to use every minute wisely. My greatest challenge was incorporating opportunities to think and reflect. During all three sessions, immediately after the introductions, I went directly into an exercise that challenged the participants to think about how they did their work. I presented content that I hoped would stimulate them to reflect and to question their assumptions and beliefs. The next step in the process was to give them exercises in small groups during which they had the opportunity to further their thinking and reflection.

The reactions of two particular respondents stand out as examples of reflective action (Mezirow, 1991): "All that thinking and interacting made me think. I went home that night, explained things to my daughter and she understood the concept and she changed her attitude." "You got me thinking about a lot of things and I am still thinking." These comments make me aware that, as a facilitator, I need to present the framework,

ideas. and logic involved. and enable the participants to take, create, and use the information in ways that would be relevant to them. As Mezirow points out, the reflective action "process begins with posing a problem and ends with taking action" (p. 108). The learning environment encouraged such thinking because it was respectful of the necessity to establish rapport. The information was presented logically, and in diverse and multiple forms. I encouraged them to take risks and I created opportunities for them to link new experiences to past experiences. I incorporated these strategies with the hope of stimulating participants to think and reflect.

Risk Taking by the Facilitator

Creating interest is necessary to set the tone and establish expectations within a learning environment. Wlodkowski (1999) defines interest "as a person's desire or preference for interaction with something" (p. 181). Wlodkowski emphasizes the need to use variety during presentations as a way to increase interest. He believes that an audience will always pay more attention to events or experiences that are changing than to those that are unchanging. On this premise. I chose four risk-taking activities as an avenue to get the participants' attention. I further assumed that if there was interest. there would be an increased chance for the participants to make meaning from the experience.

The first risk I incorporated in the first session was to introduce myself in a non-traditional way. I invited the participants to ask any questions they wanted and I agreed to answer them. Although this type of introduction seemed to surprise the participants, it did not take them long to begin asking questions and to feel comfortable with me.

The second risk was at the beginning of the session on motivation. I chose to hug each participant as they entered the room. Responses ranged from both ends of the

spectrum. There were no in-between reactions. Participants either liked it or did not. This particular risk produced the greatest number of post session responses. All nine participants who were interviewed spoke of how the hug gave an immediate impression of me as a facilitator and affected their expectations for the content to be presented. Two of the post-session participants greeted me with a hug as we met for the interview. They greeted me as if we had been friends for years. This degree of openness surprised me because I had no idea that I had established such a rapport.

The positive and negative responses that I received were exciting because I believed that if I was to achieve the amount of discussion, reflection, and thinking I wanted to achieve, I needed to stimulate a robust discussion. The tone, tension, and excitement lasted throughout the entire session. This session proved to be the one in which there were the most unsolicited questions, diverse opinions, and discussion among the participants as they left the classroom.

The third risk I took was based on creating a "situational interest"--defined as an interest created in a learning environment for the sole purpose of provoking a participant's interest (Krapp, Hidi, & Renninger, 1992). I chose to teach and use juggling as a way of demonstrating information on caring. Juggling was used as an analogy to show how four variables can be interconnected to illustrate the difficulty of achieving a goal such as caring. In the analogy, the variables were the participants, co-workers, the residents, and the work environment. The participant is connected to other variables, and may or may not have influence over these variables, as he or she attempts to increase the use of the soft-skill, caring. The participants in my session quickly developed an appreciation for what I was attempting to demonstrate. They took on the challenge of

trying to juggle and brainstorm ways to increase caring behavior both in themselves and in others around them. One written response from the post-session evaluation confirmed the value of the exercise: "I did not realize how many caring things I did in a day. I now appreciate those and have an understanding of what more I can do without feeling resentful but empowered by my job. Thank you for the opportunity." Another example of participant feedback occurred when I began the session on caring, a participant asked why I did not greet them at the door with a hug. She expected a hug because she received a hug at the last session. She was disappointed because, to her, a hug is an expression of caring, and I did not do it the second time. This question took me by surprise. However, I used it as a way to introduce the content and respond to the participant's need of caring at the time. A third example of participants' feedback to the risk taking activity of juggling is taken from the post-session interviews. A participant said, "I loved that juggling, it painted a clear picture for me about how one act affects everything you do. I remember going back to work and paying attention to things like eye contact, stopping what I am doing and really listening. You reminded me how caring is part of my job survival."

The final risk I took in all three sessions, involved my response to questions. Whenever a question was posed, I asked the participants for answers first before I gave my response. Although this may not seem like a risk for some, for me it was. In my teaching style, I have a tendency to answer and not wait. In this case, waiting took a great deal of self-control. By letting the participants answer first, I gave them the opportunity to acknowledge their own past experiences, which resulted in more involvement and ownership of the content. The participants immediately responded to the risks that I took, and I noticed that they began to pay close attention.

I believe that my risk taking contributed to the learning that occurred at each in-service. As documented in the 3-month follow-up interviews, all nine respondents remembered all of the risk-taking activities and commented on how these activities captured their attention, kept them interested, and motivated them to look forward to the next in-service session. Yet, I was aware of Wlodkowski's (1999) warning against over-using novelty because it " is often interesting but initially may carry very little meaning" (p. 181). In my study, novelty was used as a strategy to get the attention of the participants, to illustrate a specific concept, and to encourage participants to think critically. My experience confirms the need to use strategies in a balanced way with thought to the purpose. Novelty as a strategy did have positive results, and I am now more likely to use it as a strategy in my future facilitation work, but within limits.

Design Decisions in the Context of Good Practice Methods

The design decisions I made were based on the foundation of creating a learning environment that enhanced the teacher-participant exchange. As noted in chapter 3, my overarching decisions were based on models presented by Caffarella (1994), Garavaglia (1993), and Farquarson (1995). Within these models, specific factors are considered necessary for effective program planning. Caffarella's model encompasses the planning process prior to the delivery and is based on five assumptions. The first assumption is that educational programs focus on what participants want to learn. A second assumption is that the process develops both systematically and spontaneously. Third, program planning is assumed to be a complex interaction of variables. Fourth, the initiation of the process needs to be done as a cooperative endeavor. The final assumption, the use of more than one model, increases the learning of the developer.

The Garavaglia (1993) model focuses on delivery and transfer of learning. In attempting to pare down the variables within the design, I chose to focus on three. By focusing on variables over which I had some influence, I believed I would be better able to analyze my skills. The Farquarson (1995) EDICT teaching methods model was used to examine teaching strategies specifically within a health-care setting. I used the model to help me critique my teaching better.

I discuss now the decisions made during the development of content delivery regarding the variables of rapport in the context of good practice, the use of soft skills, and the use of transfer of learning strategies.

Establishing Rapport Within Content Delivery Using Good Instructional Methods

In a classroom where there are many unknowns, it is possible that adult participants can enter preoccupied by their concerns at work or home. Or, they may attend with certain expectations, depending on their past experiences with in-service sessions.

To achieve an early, positive, rapport with participants, Brookfield (1990), Heimlich and Norland (1994), and Rogers (1969) speak of the need to be authentic, genuine, congruent, and trustworthy. These authors suggest that revealing personal aspects of one's self, admitting mistakes, and taking the learners seriously can increase rapport or trust. Yet, as Wlodkowski (1999) points out, "A mere strategy does not create such a milieu" (p. 131). Establishing rapport, relevance, and choice requires preparation and much work, and are not to be taken casually. In my study, I chose the following strategies to establish rapport at the beginning of the sessions: I made eye contact with each participant as they entered, greeted the participants at the door with a hand shake at

Session 1 and 3, spoke slowly, used a low tone of voice, and dressed casually yet professionally, in warm coloured clothing. The short duration of the in-service sessions necessitated the need to establish rapport and to set the tone quickly. Because I did not have time for elaborate warm-up activities, I needed to make quick connections with the adult participants as they entered the room.

Use of Soft Skills as Content

Soft skills include leadership and interpersonal communication. These skills are difficult to quantify and to reproduce with a degree of proficiency. By contrast, hard skills are typically concrete and definable. An actual skill, such as giving an injection, can be articulated in many ways and tested quantifiably. The significance of choosing a soft skill like problem solving, motivation, or caring, for this study were two-fold. First, I wanted to challenge myself as the facilitator to deliver content identified as difficult according to the literature. Second, I wanted to see if drawing on the past knowledge and expertise of the participants makes a difference in their learning. As an educator, I believe that participants need to draw on their past knowledge and experience in each in-service session they participate in. According to Brookfield (1986), drawing on past experiences encourages critical thinking and reflection, and helps participants validate their experiences. In my study, the use of critical thinking, reflection, and validation of participants' experiences were strategies used that resulted in the participants using the soft skills content after the in-service sessions. Brookfield (1990) suggests that using stories, group exercises, and examples of the content triggers participants to think, choose, and apply the new information to their work and home situations. During the 3-month follow-up interviews, the nine participants reported that the content made them

think and that they all used the information either on the job or at home. They also reported that the stories, examples, and exercises used in the group work were the most helpful. They gave verbatim examples and repeated instructions that were given by me during the sessions. All nine remembered, and later used, two abstract situations that illustrated a concept out of context. They remembered all of the risk activities and the stories I used as examples. This confirms Caffarella's (1994) assertion that relevance and the need to build on participants' previous knowledge and experience is necessary for transfer of learning to occur.

When I reviewed the responses, questions arose for me as to why these sessions were so meaningful for the participants. I wondered whether participants who were not interviewed had similar experiences. I also wondered about the degree to which Georges (1988) emphasized the difficulty of teaching soft skills in a short period of time, and Caffarella's (1994) statement that it is not necessary to plan for transfer of learning in short-term programs like workshops. My own experience was that it is necessary to plan and that difficult topics should not be avoided.

Similarly, Heimlich and Norland (1994) state that no teacher can take sole credit for what the participant takes and uses. Participants are dynamic individuals and the most that an educator can do is to stimulate the participant into reflection and critical thinking so that they can choose to learn. Therefore, I needed to rely on participants' assertions that the content was useful for their current needs at home or at work, and that they were able to personalize the content for themselves.

Use of Transfer of Learning Strategies

I used four strategies identified in the literature as ways to increase transfer of learning. Some of the identified strategies in chapter 2 were the use of identical elements, use of general teaching principles, stimulus variability, and paying attention to the conditions for practice. In choosing a format for delivery, I considered the advice of many adult educators, including Caffarella (1994), Farquharson (1995), MacKeracher (1996), and Tallman and Holt (1987). These authors gave the following strategies as the most successful methods for transfer of learning: (a) homework assignments, (b) letters of commitment, (c) repetition of content, and (d) setting expectations. Based on their recommendations, I used these four strategies for increasing transfer of learning in the sessions. My findings show that I was moderately successful in the transfer of learning.

Although I presented homework options, of the nine participants who were interviewed, only one stated that she did one homework assignment at the end of one session. None of the other participants remembered that I had offered homework. At the end of each session, I observed only 1 or 2 participants who chose to take the assignments. Therefore, as a strategy for increasing transfer of learning, homework did not work in this particular learning situation. Based on my field notes, and the responses from the participants, I can only speculate as to the reasons why there was little interest in the assignments. One reason may have been that I was too casual about the activity. Other possible reasons were that participants had enough information from the sessions and did not want to do any more. They were simply interested in participating, or they did not want to do anything on their own time related to work. Brookfield (1990) suggests four other reasons why participants may resist. The first may have been a lack of clarity

from the teachers' instructions; second, there may be a fear of the unknown; third, the homework may have held the potential for discomfort; or, fourth, there may have been a resistance to the type of exercise. In any case, there were insufficient responses from the participants to determine what the reasons for non-participation were, but it was clear that this strategy was not appropriate in this setting at this time either.

The second strategy was writing a commitment letter. The intent of the letter was to act as a refresher to the participants 3 weeks after the completion of the in-service sessions. Six of the nine participants interviewed stated that they had completed the commitment letter. Of these, three said they read them when they arrived in the mail and were pleased that they had followed through with the exercise. The others said they threw the letters out when they received them. They indicated that they did not need the reminder; they knew what was in the letter, had not acted on the issues they wrote about, and did not want to pursue the matter. Because I had to mail the letters to the participants 3 weeks later, I was able to record the number who participated in the letter writing. In total, I mailed 52 letters. This represents a 26% response rate from all the participant sessions.

On the one hand, this is an indication that the commitment letter is a technique that has some merit. The post-session interviews suggest that the use of commitment letters did stimulate thinking and reflection, and did serve as a tool to encourage transfer of learning. However, it was also evident that although the tool initiated thought, some participants chose not to act on it. In speculating as to why action was not taken, I considered that there may not have been enough support or encouragement for the

participants, the issues the participants wrote about were too sensitive, or there may have been no desire to take action for personal reasons.

The third strategy I used to increase transfer of learning was repetition. When developing the format for the content, I chose to present three main ideas. I did not want to overload the participants with information. Therefore, I chose to present three ideas in different ways. I wanted to stimulate critical thinking and reflection upon past experience, and I wanted to enable them to apply their new learning to their work setting. I chose to repeat the information in ways suggested by Brookfield (1986, 1990), Ottoson (1994), and Wlodkowski (1999). These ideas were small group discussions, the use of concrete and abstract examples, stories, and use of novelty. Upon reviewing the responses from the follow-up interview, repetition appeared to be appreciated.

In the post-session evaluation, participants indicated a preference for diverse ways of presenting information. Comments included: "I liked all of your ideas of how to do things differently, you kept changing how you presented the information. It was interesting," and "I liked thinking with you." These responses concur with Gardner's (1993) research. Gardner proposes teaching five different ways so that participants have many opportunities to access information that is relevant to them. The responses from the 3-month follow-up interviews were similar. The participants remembered the exercises and the discussions they had with co-workers. I believe that this is an indication that it is not necessary to overwhelm the participants with information. Rather, it is possible to present old ideas in new ways to stimulate the participants to expand their view of things.

The final strategy I used was to set an expectation that they participate. When the participants first met me, I handed them paper and pencil to let them know I expected

note taking. The second indication was that I constantly asked questions. I did not present myself as the provider of all information. From the time they entered the room, to the end of the in-service session, I set an expectation that this in-service session required participation, attention, and thinking. However, despite my best efforts, not all of the participants intended to participate. Some were there because the in-service session provided a break from work. Yet, my questions and expectations raised the energy level of the room and resulted in an increase in responses from the participants. My questions helped me achieve the goal of dialogue and the active engagement of participants. I agree with Mezirow (1991) who states, "Dialogue is necessary to validate commonly held meanings" (p. 63). Without questions and discussion, there are few ways to determine what is valid or true.

In general, the follow-up interviews reflected that the participants did indeed identify and recall the transfer of learning strategies used. They repeatedly cited the transfer of learning exercises and did recall and did use the content that was presented in connection with each strategy. I believe that this is an indication that the length of the educational intervention may not be as significant in an effective learning activity as planning for transfer of learning and using strategies that influence transfer of learning.

Expression of My Learning

This portion of the thesis is an avenue for me to express my personal reflections on this study as a participant and practitioner. As the practitioner who set out to understand why I was successful in interacting and communicating information to learners, I believe I discovered some of the answers. I know that who I am as a facilitator is congruent with who I am as a person. To be successful in disseminating information

one must be confident in one's self as well as confident in the message that is communicated. With this comes the vision, energy, and purpose that leads to attainment of the goal. I now understand that, as a facilitator, I was using best practice principles in my work before I embarked on this degree. When I began this journey, I was not able to identify these practices nor was I able to articulate what these principles were. In my study, I knew that when I made the decision to take control of the learning experience and proceed even without all the information defined in the literature, it was the turning point in my work. I found that I indeed did have enough information and, using my own judgement, I was able to put everything together for the creation of three, successful educational sessions. Using my knowledge and experience, and integrating the insights from literature, I was able to create an experience that was meaningful for the learners to embrace, use, and pass on to others in their lives.

There are three points that stand out among the several "aha's" that I experienced during this process. The first was recognizing my role as a variable in the process. The second was recognizing the value of using adult participants' past experience as a foundation for learning and transferring soft skills. The third was realizing I should never underestimate the importance of establishing rapport and including participant choice in an intervention.

As a facilitator in the study, I confirmed the value of continuing to use best practice principles and paying attention to the participants and the environment. I have come to recognize and value my role as a variable in the learning exchange. Because of the barriers I was presented, I began this process by questioning my role and potential influence on participants. However, I chose to continue selecting best practice principles

listed in the literature and using my experience as a practitioner. What resulted was a validation that what I do does have a positive impact on the learning process. I, therefore, have an integral role in the educational process. As Knowles (1980) succinctly states, "The behavior of the teacher probably influences the character of the learning climate more than any other single factor" (p. 47). I agree with this statement. Brookfield (1986) says that effective facilitators need to know about voluntary learning, mutual respect, fostering critical reflection, nurturing adult participants through empowerment, and the need to operate in a collaborative mode. I believe I demonstrated these effective principles in my study. These principles do not support "the myth of the perfect teacher" (Brookfield, 1990, p. 7); rather, they enabled me to be an effective facilitator. Knowles and Brookfield point to the importance of the participant and facilitator entering each educational intervention with an attitude that this is a new opportunity to grow, develop, and test ideas. There is always a need for validation, reflection, and decision making. These thoughts bring me to a place where I can say I did achieve my learning goal of wanting to change my didactic approach to teaching in a style that was more congruent and sensitive to the learners' needs. Along with this change in style, I have to make a comment about my change in attitude. Although it was difficult, I must admit I did experience an attitude shift. When I conducted my sessions on caring, I did experience growth and appreciation for guiding my learners and not leading them.

The second challenge was to recognize and use adult participants' past experience as a foundation for learning and transferring soft skills. Although the majority of the literature refers to adult participants in the context of formal education in institutions, many participants, including those I worked with, also learn non-formally. Participants in

both formal and non-formal education typically vary demographically in the life experience they bring to the classroom. However, suggested strategies differ in intensity and purpose for non-formal education. Several authors cite the importance of using adult learners' past experience as part of the educational process (e.g., Brookfield, 1990; Cranton, 1989; Heimlich & Norland, 1994; MacKeracher, 1996; Mezirow, 1991). I was operating on a premise suggested by MacKeracher, namely, that "Adult learning focuses largely on transforming knowledge and skills derived from past experience" (p. 41). In my study, the issue was not whether the past experience of the participant was to be incorporated, but whether past experience was the foundation from which the content was to be presented. This decision of using past experiences as a foundation from which to build the content was a decision that was congruent with my beliefs as an educator and a learner. This led me to choose the risk activities that were incorporated. It was during these activities that I exposed myself as an individual, not a messenger of information. I believed these risks would serve as a tool to establish rapport, incite curiosity, and stimulate past experiences that involved the participants.

I entered into the role of educator with many assumptions. I assumed that participants already had a degree of proficiency and knowledge regarding the soft skills I was presenting. I assumed that problem solving, motivation, and caring would be relevant content. I also assumed I was dealing with participants who had other related knowledge and experience to share. I was optimistic that by incorporating risk taking activities and other exercises involving the participants' past experience, I would encourage reflection and critical thinking. My goal was to present the new information in a format that would act as a bridge for participants, hoping that they would leave the sessions wanting to try

new strategies. Indeed this did occur, as documented in the 3-month follow-up interviews where participants reported using strategies during the next shift they worked, and directly following the sessions when they went home. It was through these discoveries that I developed an understanding of current practices and models of facilitation. The decisions I made for delivery were very eclectic; I chose parts of models that seem to fit my needs and the end result was positive. However, I believe that if I were to repeat the process now, I would incorporate more of Caffarella's (1994) model because of its flexibility and cyclical nature.

The third significant learning for me was an appreciation of the importance of establishing rapport and encouraging choice for the participant. Neither one of these variables can be underestimated. It is clear to me how difficult it is to quantify these two variables and, yet, if ignored, poor rapport and lack of choice can negatively affect the end result. This appreciation is linked to Knowles' (1980) observation that "the quality and amount of learning is therefore clearly influenced by the quality and amount of interaction between the participants and their environment and by the educative potency of the environment" (p. 56). Quality interaction does not occur without rapport and communication. This study reinforced that point for me both as an educator and as a participant. I believe that in these short sessions I achieved the rapport that I did through the risks that I took as a facilitator. Therefore, the risks acted as stimulus for me to challenge my facilitation style and connect with my participants.

Conclusions

In this study, I took principles of adult learning and strategies for transfer of learning described in the literature for the classroom, and adapted them for use in in-

service sessions. I explored the factors of choice, informed participants, time for thinking and reflection, and soft skills in relation to the process of transfer of learning. Some of the conclusions that suggest themselves from the study are:

1. Adult learning principles provided the framework for decision making in the development of the in-service sessions. Participants' positive responses, and their ability to transfer and use information they had learned during the in-service sessions, indicated that these principles are appropriate for education in health-care settings.

2. Instructional design guidelines that outline a structured, sequenced, organized format for the in-service sessions were effective in encouraging reflection, critical thinking, use of past learning experiences, and transfer of learning to the work setting and home. Strategies such as using stories, small discussion groups, drawing, brain-storming, and giving examples were effective in fostering transfer of learning. The 3-month follow-up interviews proved to be useful instruments to provide feedback regarding the participants' experiences.

3. The issue of choice for the participants to participate in a learning activity is a variable that influences the participants' participation and learning experiences. Although there was no way to formally verify the impact of being required to attend the in-service session, I observed that the attention, participation, and behavior varied among the settings where participants had a choice to attend and those where they had no choice.

4. The literature on adult education asserts that the more informed participants are and the more they engage in the process of creating the educational intervention, the more they will learn and participate. These did not hold true for this series of in-service sessions. The participants received minimal information prior to the session and were not

part of the planning process. The results from the post-session questionnaire and the 3-month follow-up interviews showed that a lack of participation in the process did not appear to significantly impact the participants. They unanimously said it made no difference to them because they did not expect to participate. These comments did not surprise me because they reflect my own experiences of when I worked in a very similar environment for 10 years. Now, as an adult educator, the issue that I believe needs to be explored is whether the staff of the health-care centers would have different responses if they were given the opportunity to participate in the development of the educational interventions. I believe that in-service sessions need to be treated as educational opportunities that respect the participants' needs, and that the health-care system should examine how they approach and deliver training so that both the needs of the organization and participants are met.

5. Soft skills are controversial in that the literature suggests that they cannot be taught in a generic way. The literature says they are not skills at all, but concepts that require practice so that the participant may be able to copy the concept. My study demonstrates that, under some conditions, soft skills can be learned if participants already possess some knowledge regarding the skills to be taught. This outcome provides a basis for discussion, comparison, critical thinking, reflection in practice, and further research.

6. The opportunity to reflect and incorporate information with past experience has been documented as an essential component to the learning experience. In this learning environment, the participants articulated the need, and an appreciation for, the time to reflect and incorporate their new learning with past experiences. They also appreciated the exercises that assisted them in the process of reflection. The study provided all of us

an opportunity to listen to the opinions of others and develop a better understanding of how different individuals think and view their experiences.

Recommendations

From these conclusions, I make six recommendations to adult educators who want to incorporate transfer of learning strategies in their in-service sessions in health-care settings.

1. Adult educators in health-care settings need to focus on creating learning environments that promote transfer of learning. Establishing rapport, taking facilitation risks, and encouraging critical thinking and reflection are some of the strategies that can foster transfer of learning. Adult learning principles should be used in the development of both formal and non-formal educational interventions.

2. Adult educators who wish to encourage transfer of learning in a non-traditional health-care classroom need to incorporate specific transfer of learning strategies into their teaching. This entails making conscious decisions regarding transfer of learning in the instructional design process. Transfer of learning is a concept difficult to quantify; however, the solution is to not ignore the concept but to be creative and take risks with participants.

3. Adult educators who wish to encourage transfer of learning in these contexts need to respect the participants' need to choose to participate in an educational intervention. If participants are mandated to attend, the educator needs to be sensitive to this and must include strategies that include the participant so that a positive transition into the learning process can be achieved.

4. Adult educators who wish to foster such transfer of learning need not avoid soft skill topics when developing content areas for presentation. Content needs to be relevant to the participants and thought must be given to the delivery of content.

5. Adult educators who want to create activities that foster transfer of learning need to incorporate the participants' past experience into the context of the learning event. The participants need an opportunity to validate their experience and to make choices based on the information that they have.

6. Even though there was some evidence that the educator plays a role in the learning exchange, more success needs to be attributed to the participants who made the choice to try something different. As a result of the sessions, the participants used the information that was relevant to them, and reported an appreciation for the opportunity to think, reflect, and try new things. This report makes clear that transfer of learning was encouraged and achieved to a moderate extent.

Finally, this study allowed me to experience a teaching and learning situation that was congruent with my values, beliefs, and experience as an educator. This experience has strengthened my conclusion that transfer of learning is a concept that has been skirted in the field of adult education because of its intangibility. I suggest more studies be conducted to examine specific transfer of learning strategies, and to address the variables of participant, educator, and the learning environment. Accountability is part of evaluation and transfer of learning is a component in the process. Educators should welcome the challenge of assessing their practice.

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