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Exploring the Transfer of Learning from an Executive Development Program for Human Services Managers

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ABSTRACT. Given the limited staff development resources in human service agencies and the estimate that only 10% of learning gained through training is transferred to on-the-job performance, the transfer of learning has become a critical issue. This article examines the transfer of learning process related to a human services executive development program. It is based on a program evaluation and case study that identified three important mechanisms for the transfer of learning: (1) supervisor support of participants before, during, and after the program, (2) opportunities to share program learning with others, and (3) agency-based projects that help participants apply the knowledge gained from the training program. *[Article copies available for a fee from The Haworth Document Delivery Service: 1-800-HAWORTH. E-mail address: <docdelivery@haworthpress.com> Website: <<http://www.HaworthPress.com>> © 2006 by The Haworth Press, Inc. All rights reserved.]*

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INTRODUCTION

Training is estimated to be a \$200 billion a year industry in the United States alone (Yamnill & McLean, 2001). While organizations spend a substantial amount of money on training for the purpose of improving employee performance and enhancing organizational effectiveness and productivity, research shows that there is generally minimal return on investment (Broad, 1980; Baldwin & Ford, 1988). A commonly cited estimate is that only 10% of learning gained through training is transferred to on-the-job performance (Holton & Baldwin, 2000). If knowledge and skills acquired in training are not transferred to the workplace and maintained over time, then training may be of little long-term value to an organization. The use of interventions to enhance the transfer of learning and reduce the effect of “training decay” are a formidable task for organizations (Tziner, Haccoun, & Kadish, 1991). In the light of the limited financial resources of human service agencies to support training, it is particularly important to identify effective ways of promoting the transfer of learning and maximize their training investment.

This analysis utilizes the evaluation of an executive development program and a case study of promising practices to explore the factors that enhance the transfer of learning back to the workplace. It begins with an overview of the program that is followed by a brief review of the literature related to the transfer of learning. The case study findings include a description of the transfer of learning activities in one county. The analysis concludes with recommendations to enhance the transfer of learning for human services agencies.

AN EXECUTIVE DEVELOPMENT PROGRAM

Begun in 1994 as a collaborative effort of the Bay Area Social Services Consortium (BASSC) and the Extension program of the University of California, Berkeley, the BASSC Executive Development Program (EDP) prepares a select group of promising middle managers with the knowledge and skills needed to effectively meet the challenges of an ever-changing organizational environment in order to better serve client and community needs (Austin et al., 1999; BASSC, 2002). Annu-

ally, ten Bay Area county social service agencies select an average of 30 EDP participants per year based on their commitment to public social service, demonstrated leadership capacities, and senior management potential.

The six-week EDP is composed of three one-week instructional modules scheduled over the course of an academic year (Figure 1) that focus on: (1) leadership in the agency and in the community, (2) organizational management, and (3) emerging trends in public social service and integration of learning with agency practice. The modules include sessions led by county social services directors to provide insights into their daily challenges. In addition, the program includes a fifteen-day (or three week) internship that provides each participant with an opportunity to learn about services and organizational processes in another county agency. The goal is to examine another county's promising practices, strengths, and organizational culture. Upon completion of the internships, participants write a case study based on their experience that describes the program observed, its history, challenges, and accomplishments, and implications for their home county. Participants present their case studies to each other and to senior management in their home agency.

FIGURE 1. The Content of the BASSC Executive Development Program

<p>Module 1¹</p> <p>A) Human services: Past, Present, and Future</p> <ul style="list-style-type: none"> • New Trends on the Horizon • Evolution of Human Services Content • Cutback Management <p>B) Client-centered administration</p> <ul style="list-style-type: none"> • Core Values • Supervision as Collaboration • Creating a Learning Organization 	<p>Module 2 (continued)</p> <p>C) Leadership self-assessment</p> <ul style="list-style-type: none"> • Coaching II • Presentation Skills Workshops <p>D) Designing an inter-agency project</p>
<p>Module 2</p> <p>A) Contracting and budgeting</p> <ul style="list-style-type: none"> • Contract Management with CBOs • County budgeting and Outcomes-Based Mgmt. • State Budgeting Process <p>B) Inter-agency collaboration Working with CBOs and Collaboratives</p> <ul style="list-style-type: none"> • Public Health/Social Service Collaboration 	<p>Module 3</p> <p>A) Managing organizational change</p> <ul style="list-style-type: none"> • Organizational Change • Speaking to Public and Press <p>B) Relationship building/maintaining</p> <ul style="list-style-type: none"> • Administrator as Community Organizer • State/County relations • Labor/Management <p>C) Evaluation across programs</p> <ul style="list-style-type: none"> • Outcome Evaluation • Major County Programs (Child Welfare, Adult & Aging, Welfare-to-work) <p>D) Case Presentations</p> <ul style="list-style-type: none"> • Participant presentation of case studies and confidential written feedback by panel of agency directors and instructors

¹Module contents and schedules may vary from year to year.

In an exploratory survey of 101 graduates of the EDP (out of 170), Glezos (2003) found that the EDP helped graduates to: (1) acquire new ways of looking at the world and gaining a “big picture,” (2) increase their self-confidence and competence to successfully promote organizational change, (3) increase their capacity to take on new assignments and become better able to help the agency through the use of new or increased skills, (4) increase their capacity to network with colleagues in other counties, (5) engage in career clarification with respect to retention, promotion, and further education. As part of the survey, the graduates made the following recommendations for strengthening the EDP (Glezos, 2003): (1) develop a pre-training orientation program for the supervisors of EDP participants in order to help supervisors develop strategies for promoting the transfer of learning (especially for those supervisors who had not been through the EDP themselves), (2) regularly updated the supervisors of the EDP participants on the content of each of the three instructional modules in order to facilitate discussions with their supervisors about what had been learned and how it could be applied in the workplace, (3) regularly schedule agency-based brown bag lunches where EDP graduates could share information with other employees and thereby transfer their learning to others, (4) develop and implement a career development learning plan for each EDP participant, and (5) improve the utilization of new learning through the assignment of EDP graduates to special agency projects that address a particular organizational need.

LITERATURE REVIEW

According to Baldwin and Ford (1988), the transfer of learning is defined as the degree to which trainees effectively apply knowledge, skills, and attitudes acquired in a training program to on-the-job work performance. In addition to the application of knowledge and skills, the transfer of learning also includes the maintenance of acquired skills over time which is often contingent upon organizational support, employee motivation, and the perceived relevance of training (Donovan et al., 2001).

One of the first conceptual frameworks to describe the transfer of learning was developed by Baldwin and Ford (1988) who focused on training inputs, training outcomes, and conditions of transfer. Training inputs include: (1) trainee characteristics (such as skill or ability, motivation, and personality factors), (2) training design (learning principles,

sequencing of training material, training content, and self-management techniques), and (3) work environment (including organizational climate, peer and supervisory support, and opportunities to perform learned behaviors on the job). Training outcomes include learning and retention. The conditions of transfer include generalization and maintenance of learning. Over the past two decades, the complex nature of the transfer of learning has led researchers to examine the following factors that can enhance the transfer of learning: (a) motivation to transfer learning, (b) training design, and (c) influence of the work environment.

Motivation to Transfer Learning

Seyler, Holton, Bates, Burnett, and Carvahlo (1998) found that the perceptions of trainees about the opportunities to use learning have the strongest impact on their motivation to transfer learning. In contrast, pre-training attitudes, knowledge, and skill acquisition, and reactions to training were found to have little influence on motivation. Although Seyler et al. (1998) found that trainees entered training with some level of commitment to the transfer of learning, their commitment was tempered by the perception that environmental obstacles would be encountered upon return to the workplace that would negatively affect the transfer of learning. As a result, the attitudes about training interact with organizational factors to determine the motivation to transfer learning. Tziner, Haccoun, and Kadish (1991) examined the impact of an individual's perception of personal control over a learning situation (locus of control). They found that trainees who have an internal locus of control were more likely to transfer learning to the workplace. In essence, the perceived relevance of the training experience, the anticipated environmental obstacles to applying new learning, and the exercising of control over the application process are critical motivators in the transfer of learning.

Training Program Design

With respect to reducing "training decay" or preventing "relapse" to the old ways of thinking and behaving, a study by Burke and Baldwin (1999) found that substance abuse counselors who received training to prevent relapse were able to transfer learning to their jobs more often than did trainees in a control group that did not receive such specialized training. While an interaction was found between relapse prevention training and workplace climate related to the transfer of learning, Burke

and Baldwin (1999) found that relapse prevention alone significantly enhanced learning transfer. In their 1991 study, Tziner et al., also found that training to prevent relapse positively influenced post-training content mastery and the transfer of learning. Furthermore, a study by Richman-Hirsch (2001) indicates that the process of creating specific and attainable goals during a training program helps trainees to direct their attention and efforts to transferring learning from the training program to the workplace. In essence, building the transfer of learning expectations and activities into the training program design is critical to the application of new learning to the workplace.

Influence of the Work Environment

Tracey, Tannenbaum, and Kavanagh (1995) defined the work environment in terms of organizational climate (the shared pattern of meanings among employees about the characteristics of the organization) and organizational culture (the employee's perception and shared expectations about the importance of learning). They found that trainees perceive the organizational climate to be a significant influence on the application of newly acquired knowledge and skills. They also found that the message that the organization sends to trainees about the importance of learning and innovation could either encourage or inhibit their application of newly learned behaviors. Similarly, Awoniyi, Griego, and Morgan (2002), observed that individuals will transfer learning to a job when there is a match between the real environment and the ideal environment. They found positive relationships between the transfer of learning and the following factors: support for autonomy, low workload pressure, creativity, supervisory support, and sufficient resources. Their study indicated that the transfer of learning increases in relationship to increases in organizational support. Another aspect of organizational support is peer support that has been found to positively impact the perception of the effectiveness and usefulness of training (Liedtka, Weber, & Weber, 1999).

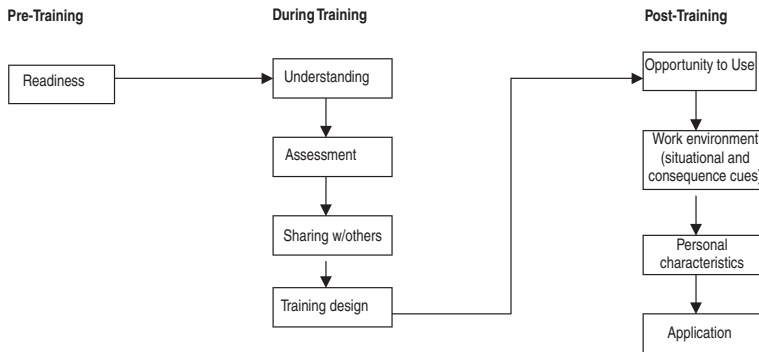
Over the past two decades, research by Broad (1982, 1997) has formed the basis for much of the knowledge about the transfer of learning. Broad and Newstrom (1992) identified nine barriers to the transfer of learning as perceived by trainees and others: (1) lack of enforcement on the job; (2) interference in the work environment; (3) non-supportive organizational structure; (4) perceived impracticality of the training; (5) perceived irrelevance of the training; (6) discomfort with change; (7) lack of trainer follow-up after training; (8) poor training design

and/or delivery; and (9) peer pressure against change. They also identified 79 strategies used by organizations before, during and after the training to promote the transfer of learning. Broad (1982) also identified the five critical dimensions of management support needed to enhance the transfer of learning: (1) involvement of upper management in program design and transfer expectations, (2) pre-training preparation, (3) support during training, (4) linkage of training content to job performance, and (5) follow-up support in relationship to the investment in training.

Rouiller and Goldstein (1993) focus on the work unit in the transfer of learning with respect to two key constructs: *situational cues* that remind trainees of the opportunity to use what they have learned in training when they return to the workplace, and *consequence cues* that involve specific types of feedback that trainees receive when they have applied learning in their jobs. The situational cues relate to work goals and tasks, social environments, and self-control and include the following four types: (1) goal cues remind trainees to use their training, (2) social cues arising from group membership and include the influence of peers, supervisors and subordinates, (3) task cues related to the nature of the job itself include technology, policy, and procedures that allow trainees to use skills and knowledge gained in training, and (4) self-control cues refer to the various control processes that encourage or discourage trainees from applying new skills. In contrast to situational cues, consequence cues include positive feedback, negative feedback, punishment, and no feedback. Positive feedback is information about the use of the training that can encourage staff to continue to transfer their new learning. Negative feedback is information about the negative consequences of not using newly-acquired skills and behavior, and punishment is when staff are punished for applying newly-learned behavior. No feedback is when no information is given about the importance of using new learning.

In summarizing the impact of the work environment on the transfer of learning, it is clear that the work environment can be assessed in terms of organizational climate and culture, organizational barriers, and enhancers, and situational and consequent cues in the work unit. Based on this brief literature review, a framework was developed to guide the evaluation and analysis of the EDP (Figure 2). It is based on the following definition of the transfer of learning: the application and generalization of knowledge, skills, and attitudes (gained in a training environment) to work responsibilities and work performance that includes a sequence of elements that occur before, during, and following a training

FIGURE 2. The Process of the Transfer of Learning



program (Baldwin & Ford, 1988). The concepts in this framework are defined in (Figure 3).

STUDY METHODOLOGY

The findings from the Glezos (2003) exploratory study of the EDP were used to identify a county that had made significant progress in developing a work environment that could support the transfer of learning (Schrandt, 2004). Recognized for innovation in program services and organizational development, the San Mateo County Human Services Agency (HSA) was selected based on the efforts of senior management to build a “learning organization” as part of the agency’s mission and defined it in terms of career development systems, continuous-learning opportunities, and the use of a human resources policy team. Their efforts were based, in part, on a regional effort of the Bay Area Social Services Consortium to define a learning organization in the context of public sector human service organizations (Carnochan & Austin, 2001). HSA offers an in-house program on Leadership and Manager Development that includes a series of courses (Values in Practice) to help employees integrate “big picture” thinking into their daily work, and develop the professional skills needed to succeed as a leader in the agency. Furthermore, external educational development opportunities

FIGURE 3. Definition of the Components of the Transfer of Learning

Readiness:	A trainee's inclination to participate in training and perceiving the value and relationship of the training of the job-related performance.
Training design	Elements of training that influence a trainee's learning transfer from the training experience to the workplace.
Understanding	A trainee's comprehension of training material and content. ²
Assessment	A trainee's perception of the value of skills and knowledge obtained in the training. ³
Sharing with others	Actions taken by the trainee to share learning with others during training. ⁴
Opportunity to use	A trainee's perception and determination of the ways that newly acquired knowledge and skills may be used in the workplace. ⁵
Work environment	Indicators and feedback elements in a trainee's work place that encourage or inhibit application of learning.
Situational cues	Indicators that remind trainees of the opportunity to use what they have learned in training when they return to the workplace. ⁵
Consequence cues	Specific types of feedback that trainees receive when they have applied learning to their job and include positive and negative feedback, punishment, or no feedback.
Personal characteristics	A trainee's attitudes and perceptions that affect how he/she transfers learning from training to the workplace.
Application	The actual utilization of knowledge and skills gained in training upon return to the workplace in connection with all the other factors.

²Burke & Baldwin, 1999; ^{3,5}Seyler et al., 1998; ^{4,6}Rouiller & Goldstein, 1993.

(e.g., EDP) provide a high quality of program knowledge and skills, retain and promote human services staff through professional development, enhance leadership abilities, and facilitate multidisciplinary collaboration through partnerships.

The San Mateo County Human Services Agency established a Human Resources Policy Team to examine personnel and staff development issues in order to transform the agency into a "learning organization" that promotes existing development opportunities, and creates new opportunities to fill identified gaps (Human Resources Policy Team, 2001). The Team has helped implement an in-house agency-wide Leadership Development Program (LDP) that offers an array of opportunities for all staff so they can develop careers and enrich their lives through alternative career development, career planning, mentoring, succession planning, and educational development. The definition of each LDP component includes the following:

1. *Alternative Career Development*: helps employees to build upon strengths; overcome barriers to development; expand on existing

- skill sets; create new challenges; and prepare for a desired level of future responsibility.
2. *Career Planning*: extends career and education opportunities to all agency staff in order to: (1) promote fulfilling and productive careers, (2) provide ongoing career assessment, (3) support long-term employment goals, (4) promote self-development, and (5) help employees to understand the importance of career advancement to the future of the organization.
 3. *Mentoring Program*: promotes leadership development by matching staff with mentors who coach and advise them. Mentoring creates a more committed and dedicated workforce that is focused on achieving agency goals while it encourages leadership to remain abreast of challenges faced by staff. It also prepares staff to assume leadership positions.
 4. *Succession Planning*: seek to retain and develop staff to ensure smooth succession in critical positions. Specific components include identifying unique competencies of promising leaders in HSA; conducting assessments of participants strengths and areas for improvement; development of an Individual Development Plan for each participant; and the identification of a mentor/coach to support the implementation of an employee's development plan.

While each of the learning opportunities offers something unique to county employees, they all retain the same goal of providing appropriate and effective career development prospects. Taken together, the elements of the Leadership Development Program provide a comprehensive framework for the support and maintenance of learning. Thus, individuals that participate in the EDP are already immersed in HSA's continuous learning environment, and are supported by the climate and culture of the agency.

The in-depth case study of San Mateo County was designed to identify the roles of the trainees and supervisory staff with respect to the use of specific tools and techniques to facilitate the transfer of learning. Exploratory and descriptive research methods were used to investigate trainee and staff behaviors, as well as the organizational factors that influence the transfer of learning. The data collection methods consisted of: (1) focus groups with program participants designed to collect information on attitudes toward learning, locus of control, reward perception, and situational and consequence cues given by supervisors and top management, and (2) semi-structured interviews with supervisors fo-

cused on attitudes toward learning, organizational climate, role of top management, situational and consequence cues given to participants, and the supervisor's opportunities to facilitate the transfer of learning by participants during and after their participation in the program. Five EDP graduates participated in each of the two focus groups for a total of ten and semi-structured interviews were conducted with five supervisors.

The small sample size of fifteen respondents in a one-county case study clearly limits the ability to generalize from the study findings. In addition to the limitations of the recall or selective memory of the EDP graduates and their supervisors, the case study would have benefited from the observations of the EDP participants by colleagues who did not participate in the EDP program. Despite these limitations, this study identifies important strategies for agencies to consider when promoting the transfer of learning.

FINDINGS

HSA has utilized the EDP to develop staff who are willing and able to move the agency in new directions. To qualify for promotion into senior management, employees need to complete the EDP. Since 1995, the San Mateo HSA has been sending an average of four employees per year through the use of a comprehensive selection process to identify participants who are committed to learning and motivated to apply management and leadership skills that will move the organization forward. Candidates are required to provide a resume and a brief essay describing their leadership competencies and potential. Upon review of the applications, the HSA's Executive Team selects four applicants who meet with the agency Executive Director to discuss the agency's vision and mission and how both can be furthered by their participation in the program. The participants are required to make a commitment to utilize the EDP program to enhance their knowledge and skills and engage in an internship outside of their own program area in order to broaden their skill set and understanding of social services. In addition to the rigorous selection process, the agency has built the following comprehensive approach to facilitate the transfer of learning: (1) pre-training orientation and the development of learning goals and objectives, (2) supervisory support that includes orienting the work team of each participant to the content and expectations of the EDP program, arranging coverage while

participants are away, using a portion of regular supervision time to discuss how new knowledge may be applied in the participant's current position, and (3) post-training assignments to special projects and alumni mentoring through quarterly meetings.

Pre-Training Factors

The expectations held by participants prior to entering into the EDP program included the desire to: (1) seize the opportunity to gain useful skills related to management, leadership, and social service systems, (2) expand their understanding of the "big picture" and gain increased leadership capacities, (3) increase their promotional and career advancement opportunities, and (4) utilize networking opportunities with other professionals in the field.

Despite a high level of participant readiness, EDP graduates as well as their supervisors noted that participants needed to be oriented to the EDP program by EDP alumni and supervisors before entering the program in order to further enhance their readiness. While the orientation meeting gives participants a flavor of some of the EDP experiences, many graduates felt that the information they obtained from talking to previous alumni one-on-one was equally (if not more) valuable. Another critical element for enhancing learner readiness, identified by both graduates and their supervisors, was goal-setting prior to entering the program. Graduates noted that goal-setting was part of the application and selection process, but that it needs to be further reinforced prior to entering the program. Additionally, some graduates commented that it would be valuable to review personal learning goals with their direct supervisors, not just the agency's director.

The findings also pointed to the need for enhancing the readiness of the participant's supervisors prior to the first module of the program. The EDP graduates as well as the supervisors strongly recommended the establishment of a pre-training orientation for the supervisors of EDP participants, particularly for those who are not EDP graduates in order to further their understanding of how to coach with regard to the transfer of learning. Many of the respondents thought that an orientation of supervisors could provide: (1) an introduction to the content of the EDP program, (2) a description of the expectations of the program, and (3) a discussion of how the supervisor could support an EDP participant.

Factors Related to Implementing the EDP

While the EDP graduates indicated that they understood the content presented to them during the course of the EDP, they noted that they did not have regular opportunities, in between the one-week modules, to share new learning with their supervisor and other staff. Both the graduates and supervisors noted that while time constraints are always an issue, the participants need to be encouraged to take the initiative to generate discussion about the EDP in order to share learning with team members that could benefit peers and subordinates. In addition, supervisors need to help participants set learning goals for their fifteen-day inter-agency exchange project. Most respondents acknowledged that it was the agency's director and deputy director who helped them to set specific goals for their project, and that these goals were then shared with their direct supervisor. A few respondents received additional support from former EDP participants.

EDP graduates and their supervisors also felt that participants need to review their learning goals *during* the course of the EDP, as a way of facilitating the transfer of learning back to the workplace. One graduate said "the learning goals need to be modified between the modules because we cannot try out all of our new learning at once but need to pick out one or two areas to work on and talk to our supervisor about how to do this." A supervisor indicated "the role of the trainee during the EDP is to take what he or she is learning, bring it back to the workplace between modules, and set goals on how to apply it to the work they are already doing . . . this legitimizes the work they are doing and really makes them think about how they can transfer knowledge."

Post-Training Factors

The findings in this section are divided into the role of the EDP participant, the workplace supervisor, and the agency's top management.

Role of Participants. Many graduates and supervisors highlighted the importance of encouraging participants to discuss the program learning with their supervisors, their county cohort of EDP participants, and other employees in order to maximize their learning, identify special projects, and set goals for utilizing newly acquired knowledge and skills. EDP graduates suggested using the San Mateo EDP Alumni Group for consultation, networking, and sharing new and innovate projects in order to facilitate the transfer of learning. Finally, a few graduates agreed that meetings with participants or graduates from other

counties would be a way to help transfer learning over the long-term. One graduate noted that “an inter-county meeting could be a forum to reflect on projects that have been implemented, or it could become a technical assistance session where we continue to share best practices with one another.” The supervisors and participants also noted that special projects and/or the implementation of the case study recommendations, based on the learning experience in another county, were important ways for EDP participants to transfer learning back to the workplace. The supervisors also commented that it is critical for EDP graduates to take time out to reflect on the overall EDP experience. Most respondents agreed that the completion of an Individual Career Development Plan at the end of the EDP would be a good idea.

Role of the Supervisor. The EDP graduates indicated that the supervisor’s role in helping them transfer learning back to the workplace should be primarily one of support. The supervisors need to have access to the EDP curriculum to use during supervision in order to create dialogue around tasks, partnerships, and ways of moving the agency forward. Following the completion of the EDP, supervisors need to use supervision time to discuss the application of all the new learning, including the implementation of the recommendations from the case study on the inter-agency project. Most of the respondents acknowledged that their supervisor did not remind them or help them to find ways to utilize new knowledge and skills or obtain resources that would assist them in transferring new learning back to the workplace after completing the EDP program. Similarly, there was inadequate supervision time to reflect upon how new knowledge and skills were being applied or any problems in applying new knowledge and skills. Despite the indication that most supervisors were providing only minimal support and guidance for the utilization of new knowledge and skills in the workplace, the majority of respondents indicated that both their supervisors and subordinates were open to them using such knowledge and skills on their own.

Role of Top Management. In looking at the role of top management in facilitating the transfer of learning for staff who attending the EDP, both graduates and their supervisors noted that top management needs to play a more proactive role in supporting agency-based special projects. While the EDP Alumni Group meetings already serve as a venue for introducing opportunities to engage in special projects, both alumni and supervisors agreed that the top management needs to create other mechanisms to streamline the development of special projects. For example,

one graduate noted that, “the EDP alumni group provides a place for sharing their leadership experiences of the members, but for those outside the group who express an interest in engaging in a project, opportunities must be created to get them involved.” In addition, both graduates and supervisors felt that top management needs to create a clearinghouse for special projects, where information on such projects could be disseminated on a larger scale, and managers and employees from different departments could come together to form workgroups for special projects.

The EDP graduates and their supervisors indicated that creating a special-project clearinghouse would allow EDP participants to apply their new learning to a project but also transfer that learning to others. The EDP alumni also suggested that top management could promote the transfer of learning by continuing to provide special projects that foster innovation, creativity, and cross-fertilization outside of mandated programs. The respondents recommended a wider dissemination of the EDP case studies to appropriate policy teams and other employees by the top management, thereby facilitating the development of workgroups and implementation strategies for the project. While the respondents acknowledged that they have had the opportunity to participate in special projects or workgroups, they agreed that mechanisms for engaging in special projects or implementing the case study need to be formalized and streamlined by the top management.

The supervisors also suggested additional elements that should be part of top management’s role in facilitating the transfer of learning, such as continuously evaluating the EDP experience. Moreover, all of the supervisors agreed that top management should be evaluating feasibility of implementing the inter-agency exchange project recommendations and, if they can, identifying the person who should be involved in supporting the project. Finally, the supervisors indicated that top management needs to maintain a continuous learning culture that includes adequately orienting participants and supervisors to the EDP program as well as provide rewards and incentives for transferring the EDP learning back to the workplace.

DISCUSSION

The evaluation of the EDP generated important findings not only for improving the program but also identified factors that can facilitate the

transfer of learning from the training program back to the agencies. The major themes relate to a supportive work environment and opportunities to apply new learning.

Supportive Work Environment

The most prominent theme that emerged from this case study is the need for the training participants to secure the support of their supervisor before, during, and after the training program. Many graduates noted that their supervisor's lack of understanding of the EDP program contributed to a lost opportunity to share information and seek further supervisory guidance. The findings suggest that an orientation for all supervisors prior to the beginning of the training program would be a useful mechanism to promote the transfer of learning. Such an orientation could equip supervisors with an understanding of the program in order to provide continuous support for learning before, during, and after the program. In addition, on-going discussion between participants and supervisors about the content of the EDP program, the identification of potential obstacles to transferring learning, the development of learning goals, and the potential application of new knowledge and skills were also found to be helpful in promoting the transfer of learning. With respect to the transfer of learning, supervisors need to understand the importance of situational and consequence cues.

Another important area that both supervisors and participants identified was the need for participants to share new learning with other staff. Currently, most EDP participants share some of their new learning with their supervisors in order to develop goals and applications of new learning, and present their final inter-agency case study to the agency's management team. However, there are few opportunities for participants to share learning with peers and subordinates, either during or after participation in the EDP. The findings suggest that the sharing of program materials with other employees during group supervision or a team meeting could promote the transfer of learning to others. The sharing could also focus on how team members might get involved in projects related to new learning.

Opportunities to Apply New Learning

The post-EDP agency projects also needed additional attention. While graduates and supervisors agreed that special projects were an

ideal way for EDP participants to transfer new knowledge and skills to the workplace, many were uncertain about the definition of special projects, how they are generated, and the different strategies for getting involved. While San Mateo County HSA currently utilizes the EDP Alumni Group to disseminate information on upcoming special projects, both graduates and their supervisors felt that this process needed further attention by the agency's top management because it prevented other interested employees from getting involved. They called for a clearinghouse mechanism for disseminating project information throughout the organization to foster increased employee involvement. In addition, the application of new learning would benefit from the use of formal career development plans, based on the learning from training programs, was seen as enhancing the transfer of learning.

CONCLUSION

This study focused on a series of factors related to the transfer of learning that: (1) precede the training experience (participant readiness), (2) emerge during the training program (training design, understanding, assessment, and sharing), and (3) follow the training experiences (opportunity to use, work environment, and personal application) that affect the transfer of learning.

The San Mateo case study highlights the work environment and learning opportunities that are needed to develop strategies for the promotion of the transfer of learning. Within the work environment, it is clear from this case study that agencies need to develop mechanisms to support supervisors so that they can play a facilitative role, using situational and consequence cues, to ensure the application of new learning by their supervisees. The mechanisms include: (a) arranging a pre-training orientation for supervisors regarding the content and expectations of the training program, (b) encouraging on-going dialogue between supervisors and participants during and after the training, (c) ensuring development of learning goals by participants, (d) sharing the learning of participants with other employees (e.g., in staff meetings), and (e) arranging special projects (in consultation with top management) to apply new learning as a way to ensure the transfer of learning.

The major lesson derived from this study is the need for social services agencies to monitor their "return on investment" in training pro-

grams by clearly defining the learning transfer process for different levels of staff in the workplace. Participants, supervisors, and top management have unique roles to play in facilitating the transfer of learning. For example, the role of the EDP participants needs to include preparing for training opportunities by setting learning goals and objectives as well as seeking and utilizing supervisor support and consultation. Similarly, supervisors need to support participants by discussing new learning, helping the participant identify ways to utilize new knowledge and skills, and reminding participants to use new learning through situational and consequence cues to highlight the use of skills. And finally, the role of the top management needs to include the continuous evaluation of the experiences of the EDP participants and develop mechanisms to apply new learning and disseminate shared experiences as part of a learning organization.

The transfer of learning holds considerable promise for agency administrators interested in maximizing the potential of training programs inside and outside of the social service agency. As Holton and Baldwin (2003) note, the organizational investment in the transfer of learning can lead to the following pay-offs:

- Becoming an *employer of choice* where learning is a key to staff recruitment and retention
- Building the *culture of a learning organization* that includes promoting new initiatives, sharing promising practices, managing change, creating people networks, and promoting awareness of resources
- Promoting *leadership development* by creating a safe environment for taking risks and learning from failures, fostering career development, and creating challenging job assignments
- Developing organization as a *source of innovation* that becomes an incubator of new ideas, a learning laboratory, a generator of new knowledge, and promoter of knowledge management and dissemination
- Creating a *value-added organization* where learning experiences are designed to improve client services, to share the benefits of a learning culture with partner agencies, and to increase public perceptions of the value of an organization that fosters a learning culture
- Promoting *organizational excellence* by defining high levels of operational competence, linking knowledge transfer to day-to-day staff performance, and strengthening the organizational competencies of staff.

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