

Chapter 6

Innovative Approaches to Improving the Transfer and Sustainability of Learning

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ABSTRACT

The importance of learning transfer in ensuring that learning contributes to an organization's competitive advantage has been undermined in organizational practice. There are two major reasons for this: 1) few studies directly explore the relationship between transfer and performance improvement, and 2) most existing transfer models are too complex for practitioners to implement. The purpose of this chapter is to explore the link between learning transfer activities and performance outcomes, and to create a framework for implementing an effective learning transfer solution. A targeted literature review meta-analysis was used to explore the performance impact of training vs. training plus transfer activities. The authors compute "difference scores" representing the percentage of improvement from the transfer activities over training alone. Activities are categorized into a framework of eleven critical learning transfer actions. They then implement the elements of the Learning Transfer Framework in three demonstration projects. By incorporating findings from the literature review, meta-analysis, and the demonstration projects, the authors propose a new transfer framework that is effective and easy to implement. Implications and directions for future researchers are advanced.

INTRODUCTION

Human Resource Development is critical for organizational innovation and is one HR strategy linked to organizational performance and productivity (Aragon-Sanchez, Aragon, & Sanz-Valle, 2003; Gardiner, Leat & Sadler-Smith, 2001). It is widely accepted that investment in human capital

in the form of training is vital for survival in the twenty-first century (McCracken & Wallace, 2000). The fundamental purpose of learning and development is to help people develop applicable work skills that, in turn, enhance creativity, innovation, and organizational performance (Berry & Morris, 2005; Lin & Morris, 2006). While this is widely acknowledged, how we measure the

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success of learning often is not in alignment with this idea. For example, the most popular model for evaluating learning and development (Kirkpatrick & Kirkpatrick, 2006) has three “levels” devoted to measuring learning outcomes, and only one measuring performance outcomes. In addition, less than 5% of organizations measure performance changes as an outcome of learning (Gordon, 1991; Swanson & Holton III, 2009).

This focus on learning outcomes, rather than performance outcomes, also has influenced how learning has been designed and delivered for most of our industry’s history. It is widely accepted that while the purpose of learning and development is to improve performance, in reality it does not result in performance change at an acceptable rate. In fact, most estimates suggest that only about 10% to 20% of the learning investments actually transfer to work performance improvements (Brinkerhoff, 2006; Georgenson, 1982; Holton & Baldwin, 2000; Saks & Belacourt in 2006).

There have been numerous studies and articles written about learning transfer and more than one literature review (Blume, Ford, Baldwin & Huang, 2009; Burke & Hutchins, 2007; Colquitt, LePine, & Noe, 2000; Russ-Eft, 2002). While this literature has added greatly to our knowledge, there are notable limitations that impede the application of this research to improving the transferability of learning.

First, studies have focused primarily on characteristics of learners (e.g., cognitive ability, locus of control) and organizational climate (Blume, et al, 2009; Burke & Hutchins, 2007), without differentiating between activities HRD practitioners can affect and ones they cannot. For example, there have been several studies showing that the cognitive ability of the learner improves learning transfer (Blume, et al, 2009). However, a practitioner cannot choose to train only highly intelligent people; nor can she/he change someone’s general intelligence. For learning transfer research to be useful, it needs to address learning transfer actions that the practitioner can actually implement.

Second, many of the studies do not differentiate learning outcomes from performance outcomes (Burke & Hutchins, 2007). While the intended focus is on transfer to performance, many of the studies use learning outcomes (knowledge gain, self-reports of learning, etc.) as the dependent variables in the studies. As a result, it is difficult to tell if the learning transfer factor is, in fact, affecting performance.

Third, there are few studies (and no reviews of studies) that make a specific comparison between training alone and training plus one or more transfer activities (Lim & Moore, 2006). That is, the literature contains few studies that use the same learning content and provide it to a group of learners as training alone and to another group as training plus one or more transfer activities, in order to make a direct comparison on the differential impact on performance improvement. This is a critical missing element from a practitioner’s perspective. Blume et al’s (2009) study came close in their meta-analysis of 89 correlational studies; however, the variables included were primarily learner characteristics and broad organizational climate factors. Knowing the size of the effect for learning transfer actions is critical for practitioners. A transfer activity has little importance if the cost of delivering that activity exceeds the value in increased performance. For example, many organizations have made significant investments in development of e-learning reinforcement and follow-up to classroom training (the traditional “blended” approach), but the evidence indicates that their overall impact on performance improvement is limited (Sitzmann, Kraiger, Stewart & Wisner, 2006).

Fourth the theories, frameworks, and models of learning transfer are too complex to be of practical use to HRD professionals (Leimbach and Marinka, 2009; Ruona, Leimbach, Holton. Bates, 2002). If better learning transfer is to result in greater innovation, then the approach must be practical enough to put into practice. Over the years, a number of scholars have offered theo-

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