Transfer of Learning: Constraints as Experienced by Management Trainees in the Private Sector

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ABSTRACT

The goal of learning interventions is to prepare an individual to acquire knowledge, skills and attitudes that will enable him/her to perform better and to be able to handle all the challenges posed by the continuous changing world of work. Transfer of learning to the workplace provides a yardstick to determine whether the goal has been attained or not. This study was conducted to answer the following questions; what is transfer of learning, what constraints have been identified in the existing research on transfer of learning, and what constraining factors prevent management trainees to transfer learning to the workplace in a private sector case study. To answer these questions a mixed research approach (qualitative and quantitative) was used. Triangulation of data was done to ensure reliability. The questionnaire was designed using the Likert rating scale and was used as a quantitative data collection tool for this study. The data was displayed through line and pie graphs for graphical illustrations. The questionnaire was analysed using a hand tabulation data coding table. The questionnaire was distributed to all 34 management trainees and only 17 completed the questionnaires. The qualitative data collection tools consisted of semi-structured and focus group interviews. The literature study pointed out that various researchers identified factors that prevent transfer of learning. The factors are; lack of organisational support, course content that is dissociated from the trainees' roles and responsibilities in the workplace, trainees' willingness and readiness. The empirical research findings revealed that organisational factors such as lack of coaching, feedback, mentoring as well as creating an opportunity for trainees to implement the skills and knowledge play a leading role while training and learner factors play a contributing role as constraints to transfer of learning to the workplace.

KEY CONCEPTS

1. **Transfer of Learning**

2. **Management Development**

3. **Training**

4. **Education**

5. **Evaluation of Learning**

6. **Mixed Research Method**

7. **Adult Education and Training**

8. **Workplace Learning**

9. **Constraints**

10. **Triangulation**

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CHAPTER 1: INTRODUCTION, PROBLEM STATEMENT AND RESEARCH DESIGN

1.1   Introduction

The 1996 gambling legalisation for South Africa affected the Morula Sun Hotel and Casino negatively. The effects were severe because not only did the Morula Sun Hotel lose their customers but experienced and skilled staff members were recruited by new casinos positioned within the cities. It was almost impossible to recruit new staff members as Morula Sun Hotel business was not growing but declining. The challenge for Morula Sun Hotel was how to fast-track their current staff from supervisory to managerial level. The training and development department was tasked to table a plan to prepare supervisors in filling managerial positions.

Morula Sun Hotel like any other South African organisation had to comply with the regulations of the Employment Equity Act no 58 of 1998 that entails that training and development as well as new appointments should reflect the demographics of the province. This implies that more people from previously disadvantaged backgrounds had to be recruited.

The training department introduced an *Accelerated Management Development Programme* to fast-track the selected candidates. The training programme consisted of 10 modules and was offered over a 3-month period. After the training programme the learners were given tasks to do. The tasks were related to the content of the modules and mentors were identified to assist learners. At the end of three months a progress review was conducted to determine what the learners had achieved.

The review was disappointing for the Morula Sun Hotel Executive Management as they viewed the whole development exercise as a waste of time and money. The progress review revealed that out of the population of 34 management trainees only 4 applied what they had learned. To the training and development practitioners, the review pointed out

that three months of training was a total waste of time and resources. An interest to explore why the trainees were not applying what they learned resulted in this study.

A literature review was conducted with special emphasis on why management development programmes fail. The review shed new light on the study as new dimensions of transfer of knowledge, skills and attitudes to new situations surfaced. Through the review I discovered that limited studies were conducted to determine the effectiveness of training. A number of concepts surfaced from the literature study, namely: transfer of knowledge, transfer of skills, transfer of training and transfer of learning. The concept of transfer of learning was adopted as it encompasses knowledge, skills and attitudes. A detailed discussion of each concept will be provided in chapter 2 and the rationale supplied for adopting the transfer of learning for this study.

1.2   Problem Statement

The ultimate goal of any training intervention in a workplace is to improve the performance or productivity within the organisation. All training interventions in a workplace are costly as the cost is calculated against the time of participants, the time of the trainers, training aids such as handouts, trainers' notes, electricity and refreshments provided to employees. This idea is supported by Rowe (1996: 17) as he points out that:

> *One can understand the concerns that top managers have over the evaluation of management training and development (T&D). If one considers the millions of pounds companies put out - not just on courses, but on trainers, consultants, hotel bookings, training rooms, materials, meals, travel etc. - then top managers are entitled to ask:*
>
> *1 Why should this produce better employees?*
> *2 How will this be to the long-term financial benefit of the company?*
>
> *In short, top managers want to see "value for money" and demand "justification" of training costs - proof that spending £X on worker Y improves the bottom line by £Z. However, while such precise measurements may be viable in some areas (e.g. numerical skills), in most instances - and certainly in areas such as management training - I believe it is impossible. Management training is more akin to teaching a child manner: one can see the benefits but it is not possible to say that a specific*

> *instruction results in a particular response. Consequently, in order to consider more qualitative factors we* monitor *programmes (through delegate questionnaires, tests and projects, workplace interviews, nominating manager interviews etc.) to ascertain whether or not they have met program objectives.*

According to Maurice Taylor (1997: 3) it is estimated that while North American industries spend over one hundred billion dollars on training and development not more than 10 percent of these expenditures actually result in transfer of knowledge to the job. If the participants do not apply what they have learned during training at the workplace, the investment on training is a total waste of time, resources and money.

Ron Caccioppe (1998: 335) points out that little research has been done to establish how much learning from classroom training and development programmes, have been transferred back to the workplace. Peter Goodge (1998: 85) supports this idea by stating that senior managers often ask what changes have been made after training and in too many cases there is nothing evident that can be labelled as 'the value of training'.

> *Something is amiss here. Either we are teaching the wrong material; or we do not mean what we say; or delegates are not listening; or it is the wrong kind of message for the organization. Somewhere along the line we have to obtain a better "match" between what we are saying and the way the organization operates. Otherwise our programmes are seeds cast on stone.* Rowe further maintains that *"managers, for the most part, do not practice what is preached despite the calls for empowerment, trust, involvement and the need to democratize the workplace (Rowe, 1996: 18).*

The problem experienced here is that organisations usually send employees to attend training interventions hoping that when they come back they will apply what they have learned in the workplace and improve their performance or productivity. As indicated above by a number of researchers, the situation does not improve as it is hoped. This study explores the constraints that prevent trainees to transfer what has been learned from learning intervention to the workplace.

1.3   Research Questions

The study is an attempt to answer the following primary research question:

'Why do management trainees not transfer what they have learned from classroom training to the workplace?

For the purpose of this study the following sub-questions arising from the problem statement will be investigated:

1. What constitutes successful transfer of learning to the workplace?
2. What constraints of transferring learning to the workplace are experienced by management trainees?
3. What is the relation between trainees' current performance and the constraints of transfer of learning?

1.4   Rationale

This research aims to define the concept 'transfer of learning' and to identify the constraints that prevent management trainees from transferring what they have learned during training intervention to the workplace. The study attempts to determine the relations between the trainees' performance and the constraints of transfer of learning. Once the constraints have been identified a strategy to manage or mitigate the constraints will be suggested so that the problem can be alleviated in future.

1.5   Research Objectives

This study attempts to address the following research objectives:
- To define the concept of transfer of learning.
- To identify the constraints preventing the transfer of learning both from the existing literature and in the workplace context.

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- To determine the relation between trainees' performance and the constraints of transfer of learning.
- To suggest a framework that can be used to eradicate or alleviate the constraints on transfer of learning.

1.6   Significance of the Study

The study will contribute to the existing body of knowledge on transfer of learning and barriers to effective application of knowledge, skills and attitudes in the workplace situation. It will also assist education and training practitioners in designing learning interventions that consider ways of dealing with constraints on transfer of learning to the workplace. The study plays an important role in ensuring that the main purpose of the National Qualifications Framework and, moreover, the South African National Skills Development Strategy which is to contribute to the economic and social potential development of every South African citizen (SAQA: 1998) is realised because its main focus is recognition and implementation of learning. A further discussion of the matter will be provided in chapter 2.

1.7   Research Design

According to Leedy (1997: 94) a research design is the plan for the study, providing the overall framework for collecting the data. This study follows a general design framework consisting of problem statement, literature study, data collection through empirical study, data analysis and a closing chapter consisting of findings, conclusion and recommendations. Both qualitative and quantitative research methods were used for the purpose of this study. According to Cresswell (2003: 210) the practice of combining two research approaches in a single research study or relational studies is called *mixed research method* because it incorporates both qualitative and quantitative procedures in a single study. Throughout this document the concept of mixed research method will be used referring to combining both qualitative and quantitative approaches. A more detailed discussion of mixed research method will be given in chapter 3.

1.8   Sampling Method

Thirty-four learners were selected for an Accelerated Management Development Programme by the Morula Sun Hotel Employment Equity and Human Resources Department. The team was broken down into three groups; the first and second team consisted of eleven participants while the third consisted of twelve participants. The teams were grouped in terms of their literacy level and positions. The first group consisted of high literacy level and more senior management trainees and were titled the Cheetahs. The second team was on an average level and were called the Tigers. The third group was called the Lions and more efforts from the education and training practitioners and mentors were to be expected.   All 34 management trainees were expected to complete the questionnaires and a specific sample was selected to attend interviews based on convenience sampling. The sampling for the focus group was determined by the number of departments and operational managers who were involved in mentoring the trainees. Chapter 3 will discuss the whole sampling process in detail.

1.9   Data Collection

Literature study was used as a basis to identify constraints of transferring learning and to define the concept; *transfer of learning*. Once the constraints had been identified from global and local literature, an empirical research was conducted using mixed research method data collection. Mixed research method data collection involves gathering both numeric and text information. The following data collection strategies were used in this study:

- Questionnaires (quantitative)
- Semi-structured interviews (qualitative)
- Focus Groups (qualitative)

The quantitative method was chosen to determine whether the management trainees experienced any of the constraints identified from the literature study. A questionnaire was specially designed to solicit data from the trainees informed by factors identified during the literature study.

1.10   Validity and Reliability

The validity of this study was maintained through using the mixed research methods and asking the same questions to the respondents through standardised questionnaire, semi-structured interview guidelines and the focus group participants. I personally made appointments with management trainees to ensure that they fill the questionnaire during my presence to ensure that their concerns and questions were addressed. A Likert scale questionnaire was used because it was tested and its reliability proven. Conducting interviews with trainees and facilitating a focus group for mentors help to validate the collected data and it moreover ensure that the data collected are reliable.

1.11   Limitations and Delimitations

This study focuses only on management trainees who attended the Accelerated Management Development Programme at the Morula Sun Hotel. The participants consisted of management trainees, training practitioners and operational managers. The limitations of this study include the availability of and willingness of the research population to avail themselves for research purposes. The researcher is close to the participants as their trainer and this might jeopardise the findings of study.

1.12   Conclusion

Transfer of learning to the workplace is essential for any organisational productivity and performance improvement. A study exploring this phenomenon would benefit the existing body of knowledge and contribute to the effectiveness of training and development interventions. The point of departure for this study is that not only the Morula Sun Hotel is experiencing this problems of transferring learning to the workplace; other organisations worldwide are experiencing the problem and therefore the study is significant.

CHAPTER 2: TRANSFER OF LEARNING CONSTRAINTS AS IDENTIFIED THROUGH LITERATURE STUDY

2.1 Introduction

In chapter one the background to this study and the research design for the study were discussed. It was mentioned that chapter two provides a theoretical context for the study by exploring literature relating to the transfer of learning to the workplace. This chapter focuses on how the literature defines transfer of learning, what constraints to the transfer of learning were identified and what possible solutions have been used to address the problem. The study focuses on South African and global literature focussing on transfer of learning.

According to Knowles (1998: 40) a theory simply explains what a phenomenon is and how it works. In this chapter, transfer of learning is regarded as a phenomenon that needs to be explained. To explain what transfer of learning is and how it works, Howe (1984: 13) poses two questions which are used as a point of departure. He maintains that before a close analysis of a phenomenon, in this case transfer of learning is conducted, the circumstances or context in which the transfer of learning has to occur and the extent to which the transfer of learning should occur must be clarified.

2.1.1 The Context of Transfer of Learning for the purpose of this study

It is crucial to define the context in which the learners are expected to operate. According to Thomas (2002: 237), the South African workforce is characterised by adversarial relationships, lack of trust and communication between individuals and groups, poor team work, apparent absence of employees, commitment and motivation for organisational goals, high staff turnover especially amongst the designated groups, industrial conflict and low levels of productivity, profitability, quality and customer service.

According to Doyle (2000: 579) managers are being presented with a new agenda of demands, expectations and challenges which some are forecasting have complex

implications for managerial roles and futures. He further states that a growing number of managers are finding themselves having to cope with additional responsibilities and longer working hours.

Vloeberghs (1998: 644) maintains that organisations used to depend on identifying supervisors who came from blue-collar and technical ranks, and from among law, finance, and engineering professionals. He further elaborates that all kinds of strategic reorientations and new structural choices ask for another management profile, such as entrepreneurship, empowerment, self steering teams, networking, mergers and takeovers.

Robbins and De Cenzo (1998: 54) argue that because of the complexity and changing nature of many jobs, today's workers may be more knowledgeable than those who manage them. This has a bearing on the transfer of learning as considerable conflict might arise between the innovative trainee and the conservative manager who want things to run as they used to.

The concept of transfer of learning is crucial to workplace learning, as it does not only contribute to increased production, but also helps to strengthen the production capability. It ensures that there is a return on investment for the organisation and contributes to individual effectiveness. This study is based on workplace learning (classroom and on the job) with special emphasis on management trainees who are adult learners. The context of transfer of learning was thoroughly explained in chapter one illustrating that there is a lack of transfer of learning at the Morula Sun Hotel and some researchers such as Rowe (1996), Goodge (1998) and Taylor (1997) agree that transfer of learning is a global problem. The next paragraph explores the South African context to determine the extent of transfer of learning constraints.

2.1.2   South African Education and Training Context

A noteworthy comment was made by Adele Thomas (2002: 237) when she indicated that the new South African workforce is characterised by an array of diverse groups which need to be leveraged for competitive advantage in the quest to combine the best management practices employed successfully elsewhere in the world with the strength that is unique in the people of South Africa and that can be used as a success driving factor in the current education and training transition. The quest for transition entails that there has to be learning and recognition of previous learning which can be realised through adequate transfer of what was has been learned to the workplace. It is therefore vital that the theoretical framework for transferring learning into the workplace be determined.

Roy Killen (1999: 14) points out that the SAQA critical outcomes are a good example of determining whether the education provided has made an impact on learners as these outcomes are intended to describe characteristics that should be possessed by all citizens of South Africa, regardless of profession, status in society, age, sex or race. The following outcomes have been identified:

Critical Outcomes

- Identify and solve problems using critical and creative thinking.
- Work effectively with others as a member of team, group, organisation and community.
- Organise and manage oneself and one's activities responsibly and effectively.
- Collect, analyse, organise and critically evaluate information.
- Communicate effectively using visual, mathematical and language skills through oral and written modes.
- Use science and technology effectively and critically.
- Demonstrate and understand the world as a set of related systems.

Developmental Outcomes

- Reflect and explore a variety of strategies to learn more effectively.
- Participating as a responsible citizen in the life of local, national and global communities.
- Being culturally and aesthetically sensitive across a range of social contexts.
- Exploring educational and career opportunities.
- Developing entrepreneurial opportunities.

Spady and Killen (1999: 4) point out that learners' career roles are missing from the framework and they add the four career roles identified by the SAQA framework which are entrepreneurial, civic, personal, and learner roles. Victor Mecoamere (Sowetan, 2001: 4) spelled out the main objectives of South Africa's Outcomes Based Education as being "to produce creative, analytical and independent thinkers as opposed to that of its predecessors. The former Minister of Education, Professor Kadar Asmal mentioned five key policy goals of education strategy while addressing the corporate Forum at Rosebank Hotel, the first key policy is to increase access and to produce graduates with the skills and competencies necessary to meet the human resources needs in South Africa. (Ministry of Education: 2002)

In 2001 a National Skills Development Strategy was adopted as a driving force to give directions to the changes initiated by SAQA in 1998. Among its objectives was "to overcome the structural rigidities and inequalities inherited from the apartheid era and to transform the labour force from low skills base to one that is committed to high quality of lifelong learning" (SAQA, 2001) The end result of this objective is for the labour force to acquire a high level skills base. To ascertain the achievement of the objectives, transfer of skills should be visible. It is therefore vital to look at how the National Qualifications Framework (NQF) provides for the transfer of learning in a workplace.

The NQF (SAQA, 2000: 3) was introduced to establish a bridge between formal learning and informal learning with the following objectives:

- Creating an integrated national framework for learning achievements.

- Facilitating access, mobility and progression within education and training system.

- Enhancing quality of education and training.

- Accelerating the redress of past unfair discrimination in education, training and employment opportunities.

- Contributing to the full personal development of each learner and the social and economic development of the nation at large.

The NQF adopts applied competence to determine whether the learning outcome has been achieved. Applied competence suggests that foundational, practical and reflexive competence should be the core of determining the achievements of learning outcomes. The NQF points out that the challenge is to maintain the balance between society's needs, organisational needs and the individual's needs.

According to the NQF (2000: 5) the South African Education system should shift from education for employment to education for employability. This implies developing the ability to adapt acquired skills to a new working environment. Adaptability is an essential element of transferring learning to the workplace. The NQF introduced a radical shift from classroom-based assessment to a combination of both classroom and workplace assessment. Assessors are encouraged to use more that one assessment method which amongst others includes observation, interviews, and testimonials, portfolio of evidence, simulations and finished products. The use of these assessment methods is an indication that assessors measure transfer of learning to the workplace. The study of transfer of learning constraints will complement the NQF because the Framework concentrates on the assessment of transfer of learning while this research focuses on the constraints preventing transfer of learning.

2.1.3   The extent of Transfer of Learning

As stated in a previous paragraph, this study focuses on the transfer of learning by management trainees within a specific private sector company, looking at how employees

transfer or should transfer their learning to the workplace. The study concentrates on the constraints preventing management trainees to transfer learning and what possible solutions can be used to address the problem. According to Doyle (2000: 582) prospective managers should be assisted to unlearn old ways, change their attitudes, modify their management style and update their professional skills.

Before training is conducted a training needs analysis should be conducted and a programme based on the needs analysis should be designed. It is hoped that when the trainees go back to their workplace there will be changes to their behaviour, attitudes and skills. The Morula Management Development Programme consists of the following Content: Managing Change, Report Writing, Assertiveness, Management Behaviour, Motivation, Leadership, Performance Management, Financial Management and Time Management. The trainees were expected to write monthly reports about their initiatives and the challenges they were experiencing.

2.1.4   Theoretical basis of Transfer of Learning

According to Leedy (1997: 71) the benefits of a literature review is, amongst others to reveal investigations to be undertaken, describe methods of dealing with similar problems situations, reveal sources of data unknown to the researcher and to increase the researcher's confidence in the selected topic. For the purpose of this study the literature review was conducted to provide clarity on the theoretical framework of the problem of transfer of learning constraints in the workplace as stated above. A literature study was conducted as a basis for identifying constraints to transfer of learning to the workplace.

Various sources have been consulted for preliminary review which relates to the following areas:
- Workplace learning
- Transfer of learning
- Adult learning
- Management development

Different learning theories were explored to determine the foundation of the problem as stated above. Slabbert (1997: 54) defines learning as the construction of meaning by the learner who utilises it to do something creatively new. The following theories are discussed in the paragraphs below: the behaviourists, cognitive theory, social learning theory, systems learning theory and post modern learning theory.

It should be noted that there are many theories of learning and the selection of these theories should not be regarded as the only one having an impact on the transfer of learning. The behaviourist, cognitive and social learning theories have been selected because they relate to human beings while the systems learning theory was selected because it deals with a complex phenomenon and as indicated by Doyle (2000: 581) stating that training and development is a subsystem that operates within a wider organisational system. The post modern approach was selected to gauge the current approach against the original one.

The *ontological approach* views learning as part of reality because from birth, through adulthood and until death, human beings learn by interacting with other beings and their environments. Epistemologically, the interaction that takes place with the environment and other beings is not spontaneous but conscious actions of giving meaning to the world Du Plooy et al. (1982: 208).

Du Plooy et al. (1982: 209) further maintain that the *ontological and epistemological* concepts cannot be separated from each other as beliefs about knowledge are formulated through interaction with other beings and the environment. Man is created with the potential to establish relationships with what is learned, to construct meaning on all possible levels (Slabbert, 1997: 39).

According Creswell (2003: 8), the *constructivist approach* is concerned with making sense and interpreting the meanings others have about the world. The following assumptions are associated with the constructivist approach:

- Meaning is constructed by human beings as they engage with the world they are interpreting.
- Humans engage with their world and make sense of it based on their historical and social perspective.
- The basic generation of meaning is always social, arising in and out of interactions within human community.

According to Creswell (2003: 7) the **post-*positivism approach*** maintains that an individual begins with a theory, collects data that either support or refute the theory and then makes the necessary revisions before additional tests are conducted. He further indicates that the post-positivist approach views knowledge as conjectural and not as an absolute truth that can never be found. Therefore evidence established in research is always imperfect and fallible.

The post-positivist approach reflects a need to examine causes that influence outcomes and the intent is to reduce the ideas into a small, discrete set of ideas such as variables, hypothesis and research questions. Creswell (2003: 7) defines the post positivist approach as a term that refers to thinking after positivism, challenging the traditional notion of the absolute truth of knowledge. The approach maintains that:

- Knowledge is conjectural – absolute truth can never be found. Evidence established through research is always imperfect and fallible.
- Research is a process of making claims and refining or abandoning some of them for other more strongly warranted opinions or viewpoints.
- Data, evidence and rational considerations shape knowledge.
- Research seeks to develop relevant true statements to explain the situation that is of concern.

These discussions on ontological, epistemological, post-positivist and constructivist informs the design and selection of methodology of this study because they all assume that evidence should be constructed through employing different techniques of qualitative

and quantitative approaches. In the next paragraph the learning approaches are further discussed.

2.1.5   Learning Theories

Different theories have been designed by theorists to try and explain how people learn. Jordan and Jordan (1989: 498) maintain that the ***behaviouristic approach*** views learning as the utilisation of previous experience in any new behavioural situation which implies that whatever has been learned is somehow retained and then reproduced or applied in a new situation. The transfer of learning can be determined through behavioural change. Mwamwenda (1995: 309) adds to this approach by indicating that learning involves a change in behaviour as a result of what one has experienced and this may be shown in the way a person thinks, acts or feels. He goes on by defining learning as relatively permanent change in behaviour following practice or experience of some kind. According to the behaviourist theories learning is transferred when material learnt in one situation is applied to a related, though different situation. These theorists denote that change in performance and the achievement of a certain standard are regarded as the most important criteria for determining whether learning has occurred or not. Tight (1996: 22) maintains that learning is a change in disposition or capability that persists over a period of time and is not simply ascribed to the process of growth.

The ***cognitive theorists*** view learning as acquiring verbal skills, intellectual skills and perceptual motor skills. Transfer of learning entails the learner being able to accumulate information on a specific task, being able to do something with the knowledge accumulated and being able to execute the task effectively (Jordan & Jordan, 1989: 499). Mwamwenda (1995: 309) further believes that the cognitive view maintains that a learner is capable of controlling his learning activity and organising his field of operation and has an inherent capacity to learn. Cognitive theory stresses the thinking, insights, meaningfulness and organising of information. In case of the transfer of learning the trainees should first demonstrate that they have learned from the training intervention

through coming up with action plans and making proposals as to how their workplace can be improved.

Social learning theory maintains that learning occurs as the learner interacts and observes others in his environment (Mwamwenda, 1995: 311). Societal norms, values and beliefs enable an individual to adjust successfully within society and thus transfer of learning in this instance entails adjusting successfully within an organisation governed by norms, values and specific beliefs. Mentors and operational managers play a crucial role to support the trainees so that they transfer what they have learned. For effective transfer of learning to happen, an effective work relationship should be fostered between the trainees, trainers, mentors and co-workers.

The definition of learning is consistent throughout the theorists including the ***post modern theorist***. One notable view is from Covey (1989: 42) who maintains that a change of focus from character ethics to personality ethics has caused many social problems for people. According to him most training programmes emphasise what he calls the psyche up approach or quick fixes rather than an approach based on universal and timeless principles. He maintains that for trainees to be able to transfer what they have learned, a training and development programme should be evaluated to see whether it was designed based on the universal and timeless principles of learning.

According to Doyle (2000: 585) training and development is a subsystem that operates within a wider organisational system. According to him, a holistic and ***systematic approach*** ensures that development interventions are effective and have the maximum impact and benefits on both the organisation and the individual. The other subsystems include employee wellbeing, reward systems, operational systems, management systems, employment equity, trade unions and performance systems.

2.2   What is Transfer of Learning (TOL)?

The goal of any learning intervention is to prepare an individual to acquire knowledge, skills and attitudes that enable him/her to better perform his/her task and to be able to handle all the challenges posed by the continuous changing world of work. A learning task has no use unless it is put into practice (Slabbert, 1997: 23).

2.2.1   Definition

Caccioppe (1998: 195) points out that there are a limited number of definitions of *transfer of learning* in the literature. He further states that "little research has been done to establish how much learning is transferred back at the workplace." Peter Goodge (1998: 86) supports the idea by pointing out that senior managers often ask what changes were made after training and in too many cases there is nothing evident that they can show as a result of training. These observations raise the question of what transfer of learning is.

Any learning has the potential of affecting the individual's future performance in some circumstances or the other and therefore all learning transfers. However in some practical circumstances the transfer of learning might not be observed.   Maurice Taylor (1997: 1) defines *Transfer of Learning* as the effective application by trainees to their jobs of the knowledge and skills gained as a result of attending an educational programme. According to Don Clark (2000: 2) transfer of learning is the influence of prior learning on performance in a new situation.

For the purpose of this study, transfer of learning is defined as putting into practice the skills, knowledge and attitudes that were gained through learning intervention on either the classroom or on job training in a specific working environment.

2.2.2   Key Concepts in Transfer of Learning

There are some key concepts that influence transfer of learning and they need to be clarified so that an in-depth understanding of the transfer of learning can be attained. Transfer of learning serves as the output or outcomes of either education or training and plays a crucial role in determining whether transfer of learning has taken place or not. The training and education concepts will now be defined to determine their link with transfer of learning.

2.2.2.1 Training

Training is defined as the use of specific means to inculcate specific learning through techniques and methods. It is therefore a deliberate effort to teach specific skills, knowledge and attitudes. According to Tight (2002: 39) the idea of training is usually associated with preparing someone to perform a task or roles it could be in a workplace or any other setting. He also adds that it involves instruction and practice aimed at reaching a particular level of competence or operative efficiency. Robbins and de Cenzo (1998: 246) define training as a learning experience that seeks to improve employees' job performance by changing their skills, knowledge, attitudes or behaviour. They further elaborate that training must be evaluated according to performance-based measures such as how well employees perform their jobs after training. These definitions affirm that the end result of training is to transfer learning as confirmed by competency and operative efficiency or simply performing the task/role learned.

2.2.2.2 Education

Nel defines education as an activity aimed at developing knowledge, moral values and understanding with the purpose of developing the student intellectually (Gerber et al. 1987: 215). Tight (2002: 15) defines education as "organised and sustained instructions designed to communicate a combination of knowledge, skills and understanding valuable for all activities of life." Knowles (1998: 10) defines education as an activity undertaken

or initiated by one or more agents that is designed to effect changes in the knowledge, skills, and attitudes of individual, groups or communities.

Tight (2002: 16) indicates that the common understanding of the words *education, training* and *learning* has linkage with specific settings. Commonly people associate learning with school, training with the work environment and learning is associated with enjoyable discovery.

For the purpose of this study, education relates to all organised efforts of the educator or practitioner as agents of education undertaken to develop or communicate knowledge, skills and attitude for the purpose of effecting changes in the life of another individual.

2.2.2.3 Adult Education and Training

Before one can define the concept of adult education it is proper to break down the concept. Tight (2002: 14) acknowledges that defining the word 'adult' has been problematic for many authors as different countries have their own set of what constitutes an adult. Some look at the age, some look at mere status of an individual. He further aligns himself with the definition that considers adulthood as a state of being that accords rights to individuals, simultaneously conferring duties and responsibilities upon them.

Gerber et al. (1987: 228) maintain that trainees in industries and organisations are mostly adult learners and they learn considerably different from children. The authors allege that adult learners evaluate and integrate what they learn in terms of their personal experiences. Adult learners are more interested in the usability of learning tasks in the future and the authors propose that the learning tasks should be broken down into smaller units. Adult learners prefer to plan their own learning and adopt self directed approach to it, like to set their own pace and whether they want guidance not grades. They judge learning achievement according to learning experience and material gain, not according to how well they scored.

Management trainees should therefore be treated as adults and this implies that training and development practitioners should take into consideration that the training content is aligned to the management trainees' work reality and that adult training principles and methods are used. To ensure that learning is meaningful to them training and development practitioners should use real-life problems rather than predetermined theoretical and abstracts notions. Gerber et al. (1987: 233) propose that an in-depth training needs analysis be done on an individual, occupational and organisational level before any training intervention is undertaken. Performance analysis should be conducted to identify any personal or work related gap so that the learning intervention design can be done accordingly.

2.2.2.4 Human Resource Development (HRD)

HRD is a process of developing or unleashing human expertise through organisational development and personnel training for the purpose of improving performance at organisational work process and individual level. HRD involves employee development and management development. This study focuses on determining whether management trainees are transferring the content learned during an accelerated management development programme. The focus is therefore on management development rather than employee development in their current positions.

2.2.2.5 Management Development

Gerber et al. (1987: 253) agree that there are various connotations to the term management development and he proposes a definition, which includes both the process and the context. A management development process is primarily concerned with helping the individual manager to change his ways in such a manner that there will immediately be discernible improvement in his management skills.   Management development programmes are usually geared to historical or past career patterns.

2.2.3   Measuring Transfer of Learning

According to May (1997: 271) evaluations seek to determine whether the acquired learning has led to any noteworthy improvements in performance or productivity. Rowe (1996: 24) favours the evaluations that allow for the measuring of the whole process of training and development (T&D) as well as the monitoring of particular programmes. He further point out that it should allow us to pose fundamental (perhaps controversial) questions about training and development, explore what T&D is trying to do and, equally important, whether there is a difference between the two. Rowe (1996: 22) maintains that course evaluations do not indicate whether there is transfer or learning or not by stating that:

> *"Given that most organizations laud the importance of T&D, it is extraordinary that so little time and effort is given to evaluating the suitability and success of programmes. Evaluation often receives little more than lip-service. Most organizations use "happiness sheets", for delegates to complete at the end of training programmes - and these have their place - but they say far more about the delegates than about the programme and do not tell you anything about how effectively delegates have digested the material and apply it in the workplace. Happiness sheets provide useful feedback for presenters but if, with a particular programme, there is little change in content, venue or presenter, and whether the returns are generally favourable, one has to question what is gained by issuing them for more than three months."*

Silvia Down (Thorpe et al. 1993: 13) identified two approaches that could be followed to evaluate the impact of transfer of learning in the workplace. The first approach is to evaluate whether the concepts learned from training can survive over a period of time. The second approach is to assess the extent to which the skills learned during training are

being implemented or whether there are plans to implement the skills in future. This study focuses on the latter approach because it relates directly to the following question: *why do management trainees not transfer what they have learned form classroom training to their workplace?*

Baldwin and Ford (in Axtell et al 1997: 202) proposed a model containing three types of influence on the transfer of learning, namely aspects of the course, characteristics of the trainee and features of the work environment. The questionnaire tool was tailored along this line of thinking and included the participant's personal details and readiness for the course, training intervention evaluation and organisational features.

Cheng and Ho (2001: 102) mention that most recent researchers refer to Donald Kirkpatrick's four-level taxonomy to evaluate transfer of learning which are;

- Reactions of participants
- Learning acquired
- Behavioural changes
- Organisational results

Kirkpatrick's four-level evaluation taxonomy is supported by a wide community of researchers. Bramley (1999: 145) is of the opinion that "developmental activities, which are interested to increase the effectiveness of managers, can be evaluated at a number of levels". In the most widely used framework of evaluation, that was proposed by Kirkpatrick. Bramley and Kitson (1994: 10) take a step further to quote Hamblin who added the fifth Level to Kirkpatrick's four levels taxonomy which is cost benefit analysis. The Hamblin's fifth-level is also supported by Adams and Waddle (2002: 15) who maintain that the Kirkpatrick fourth level focuses on the impact of courses on the whole organisation, using productivity and labour turnover; the fifth level assesses the effect of the learning on profitability and growth of the organisation as a whole. Jack Phillips (2003: 12) takes it further by introducing methods to convert data (benefits of courses i.e. productivity and labour turnover) to monetary value. The ROI conversion method is

different from many perceived process model or standards because it ensures consistent application of the process.

Al-Athari and Zairi (2002: 243) conducted a study in Kuwait aimed at identifying the best practice of training and its impact on employees' and organizations' effectiveness and performance. Their finding was that the entire sample used Kirkpatrick's model to evaluate training programmes, while only five percent of the sample added other models to that of Kirkpatrick. The authors maintain that the findings were consistent with a similar study conducted in the USA by ASTD which found that 67% of 300 sampled USA organizations use Kirkpatrick's model to conduct training evaluations.

Fred Nickols (2003: 3) uses the Kirkpatrick model as a centerpiece of his article on evaluating training because it survived the turbulence and shouldered the challenges that were channeled through the wave of changes since it was introduced in 1959. Plant and Ryan (1994: 27) maintain that Kirkpatrick was the first researcher to develop a coherent evaluation strategy and stress that the model is well known to all those involved in the development and delivery of training and that it forms the core of the systematic approach to education.

In line with Kirkpatrick's four-level evaluation taxonomy, Cheng and Ho (2001; 102) identified a narrower and more generic process that can specify the transfer of learning to the workplace. The four stages are the following:

- Pre-training Motivation
- Learning
- Training performance
- Transfer outcomes

For the purpose of this study, the Kirkpatrick model of training evaluations, including Cheng and Ho approach, was considered, mainly because the study does not only aim to determine how effective the training was but to identify the constraints of transferring learning to the workplace. The following data collection instruments were used;

- A questionnaire specifically designed for this research

- A semi-structured interview
- A focus group

2.3   Constraints to Effective Transfer of Learning

Meldrum and Atkinson (1998: 329) are of an idea that the problems do not necessarily lie with learning intervention programmes but with organisational issues. The organisation usually gives broad expectations rather than specific changes required from learning. It is therefore difficult to measure the broad expectations. They maintain that the way in which training and development are managed, restricts its ability to demonstrate the value. The authors further elaborate that management development practitioners are seen as administrators without influence in the business operation. Most of them hardly know what it entails to be a manager. The authors affirm that excellent development courses often fail to enable the individuals who attended to achieve significant organisational change due to hostility and mistrust between the practitioners and line managers leading to disappointment and frustration. Management development should not be treated as a shopping list of courses or as an item selected from a course catalogue.

Conant (1991: 188) suspects that the problem could arise from how we measure the outcomes of training and development. The central concept of this study is *transfer of learning* and a thorough review of literature focused on this concept. Tight (1996: 22) maintains that learning is a continuous holistic process grounded in experience involving interactions between the learner and the world. Illeris (1996: 169) regards learning as all processes leading to permanent capacity change whether physical, cognitive, emotional or social in nature. It extends to factors such as personal development, socialisation, qualifications and competence development. Kolesnik (1976: 158) defines transfer as a carryover of application of knowledge, skills, attitudes, habits etc., from the situation in which they were acquired to the other situation.

> *In my experience managers are usually sent on courses in "ones and twos" - and rarely with their boss. This is usually because large numbers cannot be spared out of a department at the same time but it means that delegates learn "in*

isolation" and return from programmes as "missionaries", carrying "the word" back but are unable to generate the necessary support to make real changes. Many people do their training with managers from other companies and other functions - courses at local colleges are a good example - which provides considerable gains in terms of broadening knowledge and experience, but creates problems with regard to work application. The problem for missionaries is that they invariably return to an environment hostile to the ideas they have learned and, consequently, over time, the ideas evaporate through indifference or opposition (Rowe, 1996: 20).

The paragraph above proves that there are constraints that prevent learning to be transferred to the workplace and the paragraphs below explain the nature and extent of each constraint.

2.3.1 Inadequate Coaching

Coaching is another important factor that could derail the planned learning intervention to achieve its intended objectives. Thack (2002: 207) supports this idea by pointing out that little research has been undertaken on the impact of executive coaching on leadership effectiveness and payback to the organisation. She defines coaching as a helping relationship formed between a person with managerial authority and another who needs to improve his/her professional performance and personal satisfaction.

Sussman (2002: 2) defines coaching as an ongoing relationship that focuses on the client taking action towards realisation of their vision, goals and desires. Effective coaching uses a process of inquiry to discover ways in which an individual can maximise strengths and talents, function optimally, solve problems and be responsible and accountable for actions or lack of actions.   Coaching strives to help individuals learn new behaviours and strategies, which enable him/her to overcome areas of difficulty. The coach helps to breakdown complex tasks into manageable pieces, translate thoughts into actions and can act as a pillar of support and encouragement. Gerber et al. (1987: 258) define coaching as

an instruction of a subordinate by his superior with the purpose of developing the subordinate's potential. Robbins and De Cenzo (1998: 249) claim that a coach should recognise outstanding performance towards fulfilling the plan and boosting morale of the trainers.

Garavan and Coolahan (1996: 38) identified a lack of coaching and mentoring as a barrier of career advancement citing that new graduates within a fast-tracking programme need mentors and coaches to overcome the rigidities of the organisational structure.

2.3.2   Feedback as a Constraint

Lack of constructive feedback has been labelled as another constraint of transferring learning to the workplace. Orvando (1994: 19) pointed out that feedback provides clear expectations about student learning and performance. In the absence of feedback it is difficult to ensure that learning has occurred. She further elaborates that feedback will not achieve its goal if it is not given immediately, or is not confidential, encouraging, respectful, relevant, helpful and tailored to the needs of an individual. Feedback helps to identify areas that need further study or practice and it recognises students' efforts towards achievement of goals and objectives.

Huggett (1998: 128) maintains that to get a more accurate picture of individual performance one should ask those who know the person best. Feedback from the people who work closely with the learner will help give an encompassing viewpoint. She introduces 360-degree feedback as a viable solution to ensure that students' performance is judged according to various viewpoints. She alleges that 360-degree feedback is gaining acceptance as a way of supporting development programmes and has become a relatively common feature. Sometimes giving feedback can serve as a constraint of transferring learning to the workplace, especially if the confidentiality is violated and the participants mistrust one another. Feedback by a colleague on the same position might not reflect an honest opinion resulting in false feedback.

2.3.3   Using Irrelevant Methods for Adult Learners

Adult learning has been identified as another constraint to transferring learning to the workplace. Gerber et al. (1987: 233) maintain that training practitioners often fail to realise that trainees in industries are adult learners and they learn differently from children. Adult learners have vast experience in a workplace and any training and development programme should acknowledge their personal experience. During learning adults reintegrate the new learning experience with their personal experience.

According to Gerber et al (1987: 234) adult learners are interested in gaining knowledge for its application in the near future and they like to set their own pace preferring guidance rather than grades. They judge learning experience and material according to what they have gained and not according to grades.   Breaking down tasks into smaller units is one way to make learning meaningful to adult learners.

Training practitioners should be aware that adult learners prefer to plan their own learning and to adopt a self-directed approach. They should be exposed to training that is related to actual problems rather predetermined theoretical and abstract notions.

2.3.4   Competencies and Outcomes as Constraints

May (1999: 337) believes that an effective development programme hinges on identifying common competencies and designing approaches capable of delivering the desired results in the workplace. He believes that any development will fail if it does not use action-based learning, such as meaningful and risky managerial tasks and sharing the learning experience with others. Ladkin and Jawaheer (2000: 121) identified human relations, presentation skills, accounting, language, communication, critical thinking and problem solving skills as the core managerial competencies required from every prospective manager to succeed.

Conant (1991) suspects that the problem could be with how we measure the outcomes of training and development and suggests that the outcomes of management development

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programmes should be measured by employee morale, increased productivity, improved attendance and time keeping, fewer accidents, improved quality and enhanced promotion for participation.

Brown (1999: 16) brings to the table an interesting argument with his six dimensions of leadership. He argues that most programmes do not develop learners to acquire these essential competencies. He identified six essential dimensions of a leader: a leader as a hero, actor, ambassador, immortal, powerbroker and a victim. These six dimensions entail that among the competencies of a manager there must be an element of courage and bravery, fun, sacrifice and risk-taking, and he should possess negotiation and persuasive skills as well as and social and representatives skills.

Goleman (1998, 24) defines competence as a personal trait or set of habits that lead to more effective or superior job performance. Maslow's competency model was adapted from the business ball web site and used to map out the process of how competency is attained. The model is divided into four quadrants: Unconscious Incompetence, Conscious Incompetence, Conscious Competence and Unconscious Competence.
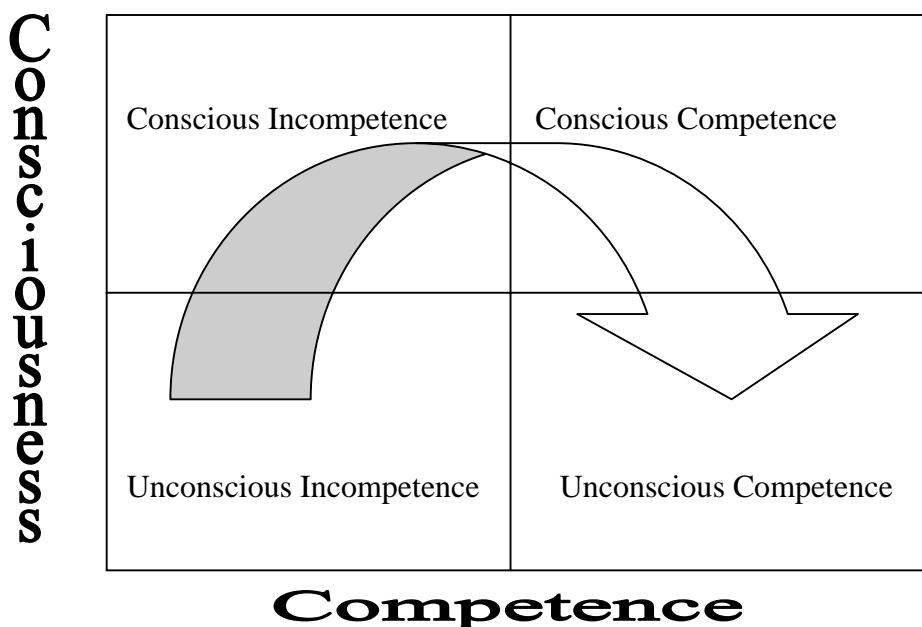
Fig; 2.1 Maslow's Competency Model adapted from business ball's personal and organisational web site.

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The Unconscious Incompetence level refers to a state wherein an individual or group has not developed a particular habit or awareness of a specific personal trait. The training practitioners will make discovery through training needs analysis and make provision to train the individual which is taking an individual to Level 2 which is Conscious Incompetence. Taking into consideration the model of competency, training and development interventions can only move the management trainees from the level of Unconscious Incompetence to Conscious Competence. It is through application that the trainees can move to the level of Conscious Competence. Finally continuous practice enables them to attain the last level which is Unconscious Competence. The competency model can be developed further by indicating which constraints are grouped at a particular window or quadrant;

Conscious Incompetence	**Conscious Competence**
Conducting Readiness Surveys and Pre-course Test	Training and Development Use of Effective Adult Training Techniques Use of Real Work Examples/Situations Maximise Participation Give Trainees Opportunity to Practice Setup Action Plans Allocate Mentors and Coaches
Unconscious Incompetence	**Unconscious Competence**
Preparation Mind Set Change (Road Shows) Definition of Desired Culture Clarifying Goals and Priorities Coaching and Mentoring Systems Developing & Aligning Competencies	Continuous Practice Self Mastery Teamwork 360 Degree Feedback Intelligences

Fig: 2.2 Maslow's competency model with training process details added on each quadrant.

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Covey maintains that when we speak of Intelligence, we usually think in terms of Mental Intelligence (IQ) which refers to our ability to analyse, reason, think abstractly, use language, visualise and comprehend (Covey, 2004, 50). Much emphasis on IQ inhibits people from unleashing their potential as they become emotionally troubled, feel pressured to maintain the high standard, feel lonely, depressed, angry, prone to aggression and are unruly (Goleman, 1998, 11). A conclusion can be made from this observation that any learning intervention that overemphasises Mental Intelligence inhibits effective transfer of learning. For effective transfer of learning to take place, emotional intelligence, spiritual intelligence, physical intelligence and mental intelligence should be considered. In short the body, heart, spirit and the mind should all be involved.

"Businesses are waking up to the fact that even the most expensive training can go awry, and often does. This ineptness comes at a time when emotional intelligence in individuals and organizations is emerging as a missing ingredient in the recipe for competitiveness" (Goleman, 1998: 9). The rules for work are changing as people are not just judged by how smart they are, or what training they attended but also by how well they handle themselves and others. Emotional Intelligence therefore includes how people control themselves in difficult circumstances and how well they lead their lives.

2.3.5   The role of Culture as a Constraint

Swartz and Davis (1997: 292) presented a new concept that could well be regarded as another barrier to transfer of learning. They believe that the role of culture in an organisation is of the utmost importance. They further allege that cultural practice provides a rich tableau to aid diagnosis of organisational problems.

In their journal titled "Ubuntu", MacFairlin et al. (1999: 63) state that cultural and contextual differences between groups contribute to large perception gaps with respect to how employees should be led, motivated and developed. Looking at the South African context, they argue that white managers often rely on western values that are inconsistent

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with African approaches during management development. Their research revealed that management development in South Africa continues to reflect the strategies used by colonial powers dominated by rationalism, individualism and autocracy ignoring the co-operative and communal principles of African culture. They close their argument by stating that western efforts at modernising management development have largely failed in African countries because they ignored local values.

Mellahi (2000: 298) expands this viewpoint of culture as a possible barrier to transfer of learning by pointing out that it is faulty to assume a universality of management and leadership development. According to him, managerial and leadership attitudes, values and behaviour differ across national cultures. He is of the idea that management and leadership development should be tailored to the context of learner's local culture.

2.3.6   Learning Programmes Dissociated from Reality/Work Situation

A development programme that builds on old ways would not bring any changes in the learners. Doyle (2000: 582) argues that management development should assist managers to unlearn old ways, change their attitudes, modify their management style and update their professional skills.

Rothwell and Kazanas (1988: 38) add to the idea by stating that learning interventions are usually geared to historical or past career patterns or those theoretically possible plenary courses dissociated from real-life experiences. Most development programmes make no attempt to predict how training changes the future and are often based on outdated information. The authors maintain that staff trainers who conduct training are not the employees' immediate supervisors and are rarely aware of conditions on the job that prevent transfer of learning.

Stephen Covey illustrates the downfall of training and development that is not aligned with the work situation in the following words: "Despite all our gains in technology,

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product innovation and world markets, most people are not thriving in the organisations they work for. They are neither fulfilled nor excited. They are frustrated. They are not clear about where the organization is headed or what its highest priorities are. They are bogged down and distracted. Most of all they don't feel they can change much" (2004: 3). Matching the outcomes of management development interventions with the widely important goals of the organisation is mandatory for the smooth application of what has been learned from management development interventions.

2.3.7   Unmanaged Change as a Constraint of Transfer of Learning

John Kotter (1996: 12) identified eight common errors people make that constitute reasons for lack of transfer of learning to the workplace while introducing change:

- Lack of a high sense of urgency and allowing complacency
- Failing to create a supplying guiding coalition
- Underestimating the power of vision
- Under-communicating the vision
- Permitting obstacles to block the vision
- Failing to create short-term wins
- Declaring victory too soon
- Neglecting to anchor changes firmly in the corporate culture

2.3.8   Outside-in Approach

People who focus on an outside-in approach feel victimised, immobilised and focus on the weaknesses of other people and circumstances. They often feel that they are responsible for their stagnant situation. Outside-in oriented people believe that the problem is out there, not with them.

Approaches that are built on character ethics result in personal and interpersonal effectiveness, thereby contributing to organisational effectiveness. "The Character Ethic is based on the fundamental idea that there are principles that govern human effectiveness

– natural laws in the human dimension that are just as real, just as unchanging and unarguably *'there'* as laws, such as gravity in the physical dimension" (Covey, 1989: 33).

Covey places most of his emphasis on what he calls human endowments or gifts of life which makes it possible for people to lead effective lives. Every living soul is born with Self-Awareness, Imagination, Conscience and an Independent Will. These human endowments enable a person to exercise his freedom of choice irrespective of the circumstances. In his latest book "The 8th habit of highly effective people, Covey expands the idea of effectiveness to include a person's vision, conscience, passion and discipline (Covey, 2004: 5).

The character principles as identified by Covey (1989: 16) play a crucial role in the transfer of learning as they illustrates whether the effectiveness level has been attained or not. Firstly a habit is developed through the combination of Knowledge, Skills and Attitudes; secondly effectiveness results from maintaining a balance between production and production capability; finally the things we see have an impact on the way we do things and determine the results we get. The trainees' vision directs what they currently do resulting from the unsatisfactory performance. The trainees' and the organisational vision might be different.

SEE (VISION)

GET (RESULTS)

DO (BEHAVIOUR)
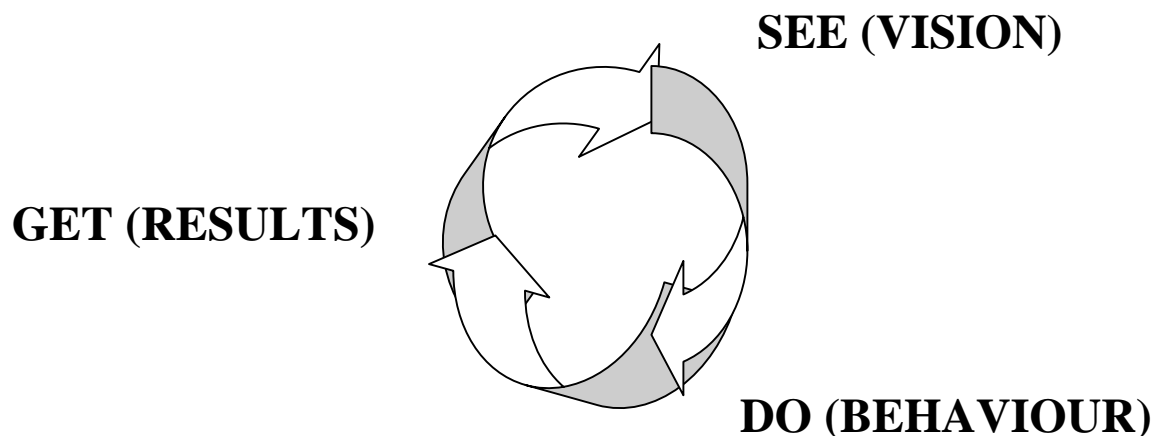
Figure 2.3 Basic Change Model adapted from Life Matters (Merrill & Merrill, 2003; 18)

The Basic Change Model entails that trainees should have vision depicted as S*ee* of what they are going to do with what they learned from the course. The action plan is an indication that the trainees have the vision or not. The *Do* section refers to behaviours that trainees should display at the workplace which would inform if there is a transfer of learning. In the absence of change in behaviours, then it would be assumed that there was no transfer of learning. The final item on the Basic Change Model is the *Get*, which refers to the transfer of learning results. This study of transfer of learning will focus on the first two sections, the *See* and *Do* sections.

Taking initiative to implement what has been learned from the interventions is the prerogative of the individual and is embedded in what Covey (1989: 16) call a habit of proactiveness rather than just waiting for things to happen. Taking initiatives implies having the vision of what needs to be achieved. People expect things to just happen without first thinking what needs to happen. Organisations and individuals do not reach their maximum potential because they are absorbed by urgent things which do not make any noticeable significant difference. Much focus on things that are not important yields desired results and obviously results in non-performance; Covey therefore maintains that people expect to win public victory without focusing on private victory. According to him the key to private victory is being proactive, beginning with an end in mind and putting first things first. Without this victory there will not be any transfer of learning to the workplace.

2.3.9 Lack of Teamwork

According to Maxwell (2001: 4) just about everything a person does, depend on teamwork it does not matter whether it is a leader, follower, coach or player. He further states that every change, improvement or winning involves paying a price through sacrifice, time commitment, personal development and unselfishness (2001: 141). If management trainees are not willing to sacrifice, develop themselves, are not time

conscious and do not contribute to the development of their teams, they are doomed to failure.

2.3.10 Learning Programme Design Factors that Prevent Effective Transfer of Learning

Sylvia Downs in Thorpe et al. (1993: 31) identified a number of factors that constitute blocks to learning. She grouped the factors into two; the ones the learner can influence and the ones the learner cannot influence. The factors that can be influenced by the learner include the trainer style, content, structure, memorising, understanding, doing, attitudes, fears and personal distracters. The factors that the learner cannot influence include environment, aptitudes, interest, equipments and material and disruptions. For effective transfer of learning to take place, the factors should be dealt with before the training interventions. Downs illustrates the factors in a figure below:

What blocks learning

Learner can influence

Trainer

Style

Content

Structure

Learning Skills

Memorising

Understanding

Doing

Attitude to learning

Fears

Personal Distractors

Learner cannot influence

Learner

Environment

Aptitudes

Equipment/materials

Interest

Disruptions
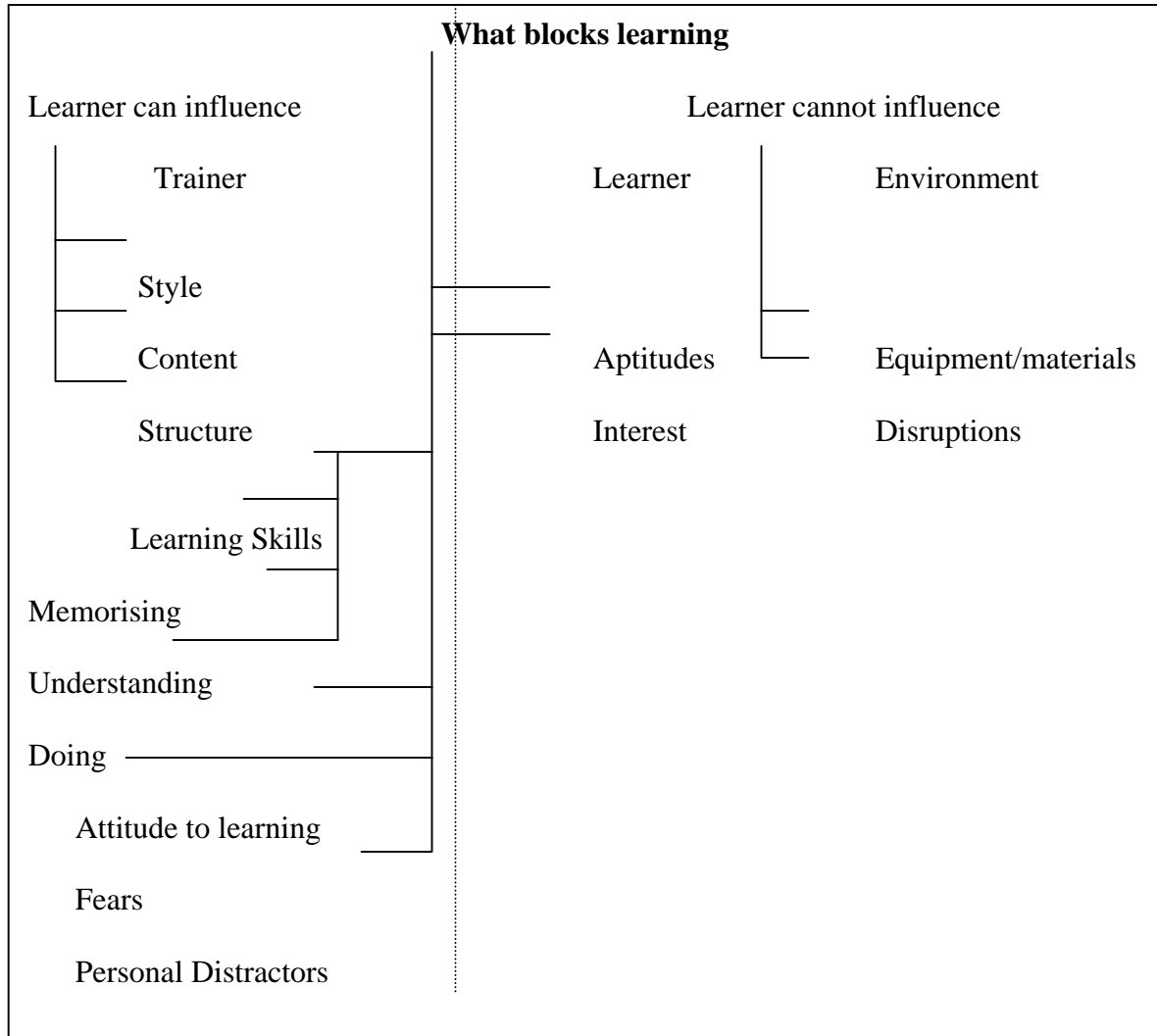
Figure 2.4 - Down's model of learning blockages ;(Thorpe et al, 1993)

2.4   Illustration of Consolidated Constraints to Effective Transfer of Learning

All constraints identified above can be grouped into three categories. The first group consist of constraints found within the organisation or workplace, the second category refers to constraints identified or caused by the learner and the last category refers to all constraints relating to the design and implementation. The existence of each factor was determined during the empirical study done through a selected sample. More detail about the empirical study will be provided in the next chapter. Although the constraints have been grouped into three categories, some are inseparable and go hand-in-hand. Below is a triangle reflecting the factors consolidated from the constraints discussed above.

Workplace Factors

The Learner Factors

Training Factors
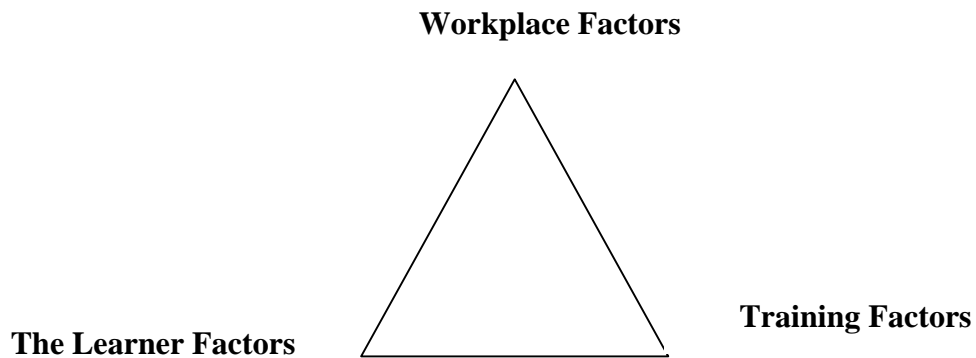
Figure 2.5 Constraints to transfer of learning

2.4.1   Constraints to Effective Transfer of Learning Identified in various sources

The constraints to learning have been summarised in a table and divided into three columns as indicated below:

Training Factors	The Learner	The Workplace
Preparation	Willingness	**Culture**
Training strategies	Level of learning	Mentor
Evaluation methods	Work experience	Coaching
Trainers	Routine work	Feedback
Competencies	Language	Performance assessments
Theoretical Content		Mobility
		Opportunity

Table 2.1: Consolidated Constraints to the Transfer of Learning to the Workplace

2.5   Conclusion

Doyle (2000: 580) provided an overview of problems experienced in efforts to improve the transfer of learning through management development. These problems include the following:

- The existence of great doubts in investing in management development.
- Business acumen or keen interest in the subject of management development.
- Lack of credibility for those involved in management development.
- Lack of strategic thinking during the implementation of management development.
- Inability to involve political offensive and defensive tactics to sustain management development efforts.
- Some management development activities are perceived as detached from management reality.
- Role confusion over management development responsibility.
- Operational priorities conflicting with management development.
- Lack of commitment by senior managers.

CHAPTER 3: RESEARCH METHOD

3.1   Introduction

In chapter two I reviewed sources related to the constraints of transferring learning (TOL) to the workplace, defined the concept of TOL and listed the constraints to TOL as identified by numerous researchers. In chapter three the focus is on the methodology used to identify the existence of constraints to transfer of learning at the Morula Sun Hotel. This chapter will provide a theoretical overview of the methodology used, data collection strategies and sampling and triangulation as a data analysis technique.

3.2   Research Methodology

Leedy (1997: 104) defines methodology as merely an operational framework within which data is placed so that its meaning may be seen more clearly. He further maintains that there is a broad spectrum of methodological terminologies which evolves into two approaches to collecting and analysing data: qualitative and quantitative. According to him a quantitative approach is used to answer questions about relationships among measured variables with the purpose of explaining, predicting and controlling phenomena, while a qualitative approach is used to answer questions about the nature of phenomena with the purpose of describing and understanding the phenomena from the participant's point of view. Leedy (1997: 108) believes that many research studies would be enhanced by combining both qualitative and quantitative methods but the novice researchers may not have the time, resources or expertise to combine approaches for the initial research attempts effectively.

Heeding Leedy's advice that the combination of the two approaches can enhance the research findings, I developed a desire to explore the possibility of combining the two approaches further. Cresswell (2003: 4) labels the concept of combining qualitative and quantitative approaches as the mixed research method. Cresswell (2003: 210) further states that the mixed research method incorporate both qualitative and quantitative

procedures in a single study. Throughout this document the concept of the mixed research method refers to combining the qualitative and quantitative methods.

The purpose of using the mixed research method for this study is to confirm the existence of constraints to transfer of learning to the workplace as identified through the literature study and to better understand the research problem by triangulating both numeric trends and the details from interviews and the focus group. The mixed research method was used to collect data because it has the potential to strengthen the findings and to maintain validity and reliability of data collections. Another reason for using this approach in this study is the assumption that collecting data using diverse methods will result in better understanding of the research problem and clarifying any misunderstanding that might arise with the quantitative data collection methods.

3.2.1 Theoretical Overview of the Mixed Method Research

According to Creswell (2003: 15) the concept of mixing different methods in a single study probably originated in 1959 when Campbell and Fiske used multiple methods to study the validity of psychological traits. This encouraged others to mix methods, and observations and interviews were combined with surveys. According to Amaratunga et al. (2002: 22) a mixed research approach helps to enable confirmation or corroboration of qualitative and quantitative methods, elaborates or develops analysis providing richer details and initiates new lines of thinking through attention and providing fresh insights.

Creswell (2002: 560) defines mixed method research design as a procedure for collecting both qualitative and quantitative data in a single study and analysing and reporting the data based on a priority of information. According to Punch in Tashakkori and Teddlie (2003: 15) quantitative research has typically been more directed at theory verification while qualitative research has typically been more concerned with theory generation.

According to Creswell (2003: 211) it is essential to clarify the sequence of implementation of mixed methodology. The researcher must clarify whether the

quantitative or qualitative data collection would be employed first and whether the analysis is integrated or done separately. For the purpose of this study, the quantitative data collection was done first followed by the qualitative data collection. The reason for choosing this sequence is embedded in the need to give all learners an opportunity to complete a questionnaire for a general view and then the qualitative method was used to validate and support the responses made in the questionnaires.

Another criterion stated by Creswell (2003: 212) in choosing the mixed methodology that needs to be clarified, is what priority is given to either quantitative or qualitative methodology.   This study allocated an equal priority to each method because the data collected are valuable irrespective of how the data were collected. However, two data collection techniques were used (Interviews and a Focus Group) for the qualitative work, whilst only one technique was used for the quantitative data collection. A mixed research methods design was used to collect data and the triangulation data analysis was used as a complementary tool to make sense of the data collected. Tashakkori and Teddlie (2003: X) maintain that the mixed research design evolved from the notion of triangulating the information from different data sources. They further argue that a mixed research method design can answer research questions that the other methodologies cannot and that it provides the opportunity for presenting a greater diversity of divergent views.

The research started with a literature review to clarify the concept of TOL and to ascertain whether any research has been done on the concept. The directives or findings of the literature review were used to design a questionnaire which was distributed to all trainees. The responses of the trainees were validated through using one-on-one interviews and focus group interviews. This research approach was informed by the mixed research approach designed by Amaratunga et al. (2002: 30) as indicated below.
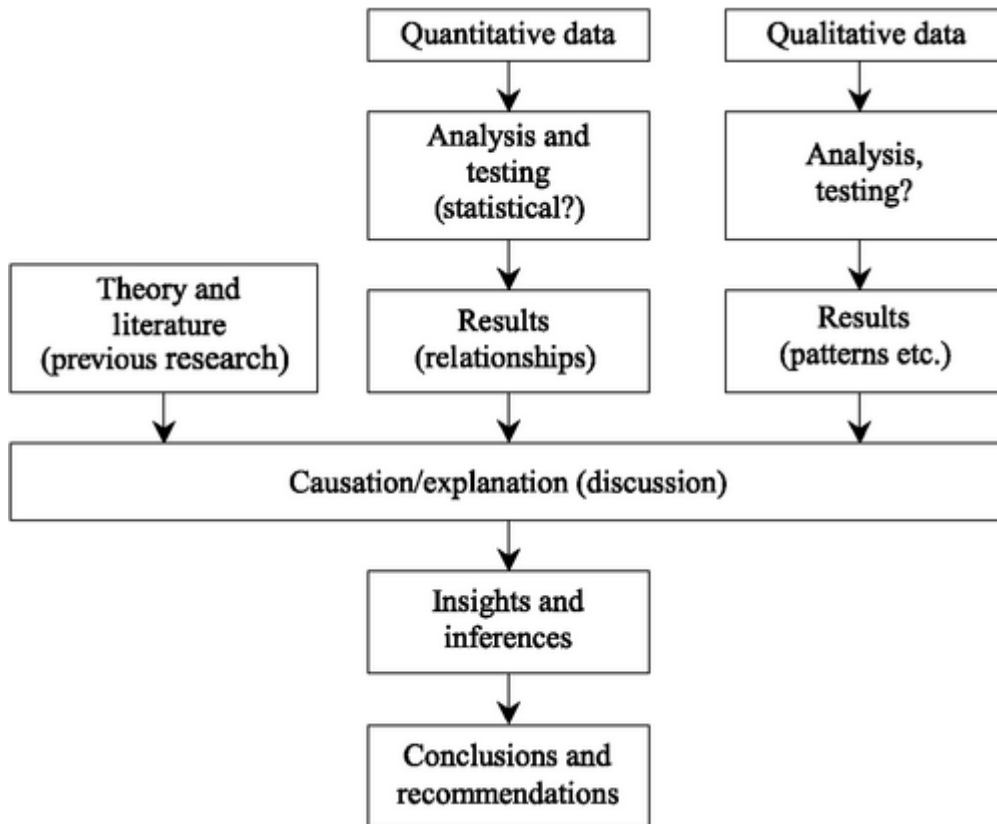
Figure 3.1 Amaratunga, Baldry, Sarshar and Newton's (2002: 30) model of the mixed research approach.

3.2.2   Quantitative Research

According to Creswell (2003: 13) quantitative methods involve the process of collecting, analysing and interpreting data and writing the results of a study in a manner consistent with a survey or experimental methods. He further defines survey as a design that provides a quantitative or numeric description of trends, attitudes or opinions of a population by studying a sample of that population from which a generalisation is made. A cross-sectional approach was used which implies that data were collected at one instance through a questionnaire and then analysed. The questionnaire is the viable method because of its cost effectiveness and it can be applied within a short period of time without compromising the validity and reliability of the research.

According to Amaratunga et al., (2002: 20) the quantitative approach involves a process that is directed towards the development of a testable hypothesis and theory which can be generalised across settings and that utilises deductive logic. The authors further elaborate that quantitative investigations look for distinguishing features and tend to measure 'how much' or 'how often'.

Eachus (2000: 7) maintains that the quantitative research attempts to gain understanding of the phenomenon under investigation so that researchers may use this understanding in order to make predictions about the real world and thus develop techniques or procedures which allow a degree of control to be exerted over that phenomenon.

3.2.3   Qualitative Research

According to Amatarangu et al. (2002: 20) qualitative data collection methods are useful when one needs to supplement, validate, explain, illuminate or reinterpret quantitative data gathered from the same setting. Interviews are important because they not only allow the researcher to read nonverbal responses but commit the respondent to the course due to the presence of the researcher. To ensure that the data collected for analysis are reliable and valid, a triangulation method was used to identify areas of differences and similarities between the one-on-one and collective interviews or focus group interviews.

Research Population (Sampling)

The study was conducted on 34 management trainees. Although it was expected that data collection tools would be administered to all 34, only 17 trainees completed the questionnaires with two withdrawals and 15 opting not to complete for personal reasons. All 17 trainees who completed the questionnaires were sent an interview schedule and only eleven responded to the schedule. All departmental operations managers were invited to attend the focus group and the representation was excellent because there was a representative from each department.

3.4 Data Collection Method

In this study all 34 management trainees were expected to complete the questionnaires. The ideal sampling method for this study was to have all 34 management trainees complete the questionnaires and from these a particular sample was selected for interviews using the non-probability sampling or convenience sampling. According Creswell (2002: 166) when the researcher selects participants because they are willing and available to be studied, a convenience sampling method is used. The focus group participants were selected in such a way that they represent the trainees committed on the accelerated development programme and representation of departments at the Morula Sun Hotel.

For interview purposes the sampled trainees were invited to attend a 30-minute interview over one week. A five-day schedule accommodating eight trainees per day was distributed to the trainees to select the appropriate time for an interview. The anticipated problems were that all trainees could reject the invitation for interviews or only a few would accept the invitation. If the majority of the trainees rejected the invitation, they were requested to suggest the time they could attend. All operational managers representing all departments at the Morula Sun Hotel were invited to attend a focus group interview.

3.4.1 Questionnaires

The questionnaire was designed according to Baldwin and Ford's proposal of a model containing three types of influences on transfer of learning which are; aspects of the course, characteristics of the trainee and features of the work environment (Axtell et al. 1997: 202). The model is supported by Bramley (1999: 146) who points out that "the intention is to assess changes in work behaviour and effectiveness; a model which has individual learning as its main focus may well be inadequate for the purpose because it ignores key aspects of the organisational context in which learning is translated into effective managerial behaviour."

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After three months of attending the programme, a questionnaire was distributed to all the management trainees to determine whether they were implementing what they had learned during training. The questionnaire was designed specifically for this study and it reflected four sections of data collections. The first section consisted of the demographics data i.e. the positions, gender, race, education level, literacy level and course attendance history were collected. This information was critical for the study as some of the constraints may be related to the factors associated with the demographics. The second section of the instrument looked at the intervention design and implementation which called for the satisfaction level of the participants. The third section assessed the learner's readiness and willingness to attend the intervention while the fourth section assessed the organisational factors which focus mainly implementation aspects.

The questions were structured in such a way that the participants were asked to select the most appropriate answer on a five-level Likert interval ratio scale ranking order. Participants had to choose from strongly disagree, disagree, neutral, agree or strongly agree.

EXAMPLE

QUESTION 1: The time of training was appropriate

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1 ⊠	2 ○	3 ○	4 ○	5 ○

According to Merwin (1992: 59) the advantage of using this type of rating scale is that data are easily analysed as choices are standardised, the participants can answer rapidly and the total numbers are easily averaged for a mean score. She indicates that even though there are advantages to this form of evaluation there is a need to combine this questioning with open ended questions which for the purpose of this study was done through interviews which form a basis of using the mixed method design. To analyse data collected through the questionnaire instruments, a coding table was used on which a scoring data of 1 – 5 was used. The data collected are displayed numerically and then

transformed to qualitative data so that it can be interpreted easily. According to Creswell (2002: 172) the popular Likert scale (strongly agree to strongly disagree) illustrates a scale with theoretical equal intervals amongst the responses. He further adds that the scale is well tested.

3.4.2   Interviews

Sussman (2002: 2) defines an interview as a diagnosis which implies the gathering of information about the course of a specific type of learning disability that an individual may have, based on the current state of events. The lack of learning transfer in this instance can be categorised as a learning disability.   Amatarangu et al. (2002: 23) maintain that the interview research method is widely used and because it is highly flexible, it can be used almost anywhere and is capable of producing data of great depth. They further describe the goal of an interview as to see the research problem from the perspective of the interviewee and to understand why and how researchers come to have this particular perspective. For the purpose of this study an interview was selected to validate the findings of the quantitative data collection and to clarify the meaning of the findings.

McNamara (1999: 3) identified a number of interview techniques that can be used to collect data from the population under study. They are a general interview guide, conversational interview, standardised open ended interview and a closed fixed response interview.   He further explains that the general interview gives the researcher an opportunity to ask general questions giving the respondents a degree of freedom and adaptability. The weakness of this type is that the researcher might end up not asking questions that are related to the topic. It is easy to deviate from the topic under investigation, which would affect the validity and the reliability of the responses from participants.

A conversations (unstructured) interview is not planned but takes place spontaneously. The researcher can take a walk where the trainees work and whoever is available is

engaged in a conversation geared towards the experiences of the respondents about the topic under investigation. No predetermined questions are asked, the interview goes with the flow (McNamara, 1999: 4). This type of interview is not suitable for the study as it might compromise the validity and reliability of responses received from participants.

The other type is a closed fixed response (structured interview) wherein participants are asked exactly the same questions and same responses are expected with minimal deviations. At times they have to choose from the given responses. The questions have to be the same and do not allow the participants to elaborate on their answers. This study recognises that participants are unique with individual differences and therefore there is a need to explore their answers further to understand their context. Therefore this study adopts the concept of semi-structured interviews as identified by Jarrat (1996: 7) using standardised open-ended questions.

As a result of the discussions above a one-on-one interview semi-structured interview was used as a qualitative research method. According to Jarratt (1996: 10) a semi-structured interviews approach allows the researcher to cover a specific list of topic areas with the time allocated to each topic area being left to the discretion of the interviewer. This allows for the easy exploration of unexpected facts or attitudes. The semi-structured interview is intended to gain an in-depth understanding of the challenges faced by the trainees in applying the skills and knowledge they have learned from training.

The one-on-one interviews were conducted for 15 minutes with a sample of management trainees. The process is aimed at assessing the validity of trainees' responses to the questionnaires and the impact of the Accelerated Management Development Programme with special focus on the barriers of transferring learning to the workplace.

3.4.3   Focus Groups

Tashakkori and Teddlie (2003: 309) define focus groups as a technique useful for generating ideas and impressions and for learning how participants think and interact in a

relatively unstructured group situation. The authors maintain that focus groups can be used to support or inform the development of questionnaires and interviews guidelines. According to Eachus (2000: 4) a focus group is an increasing popular technique used by both quantitative and qualitative researchers. A focus group is essentially a situation contrived by the researcher in which a number of people are brought together to discuss a particular issue. He further describes a focus group as a collective interview in which it is hoped that the participants through their interactions may provide data and insights which may not have been revealed through interviews and questionnaires. To benefit from the collective interview it is vital for the researcher to have clear aims and a well defined purpose for the group.

For this study, the focus group consisted of eight participants selected from different departments within the Morula Sun Hotel. Data gathering was done by capturing participants' key points verbatim on flip charts and then typed into a work page. The focus group started by introductions, followed by a discussion of the purpose and the role to be played during the collective interview. The interview was aimed at determining whether the training conducted had an impact on the participants or not. The respondents' details were captured upfront in case I needed more clarification on a particular response. Although their names were written on the flip chart, they will not be included on the report as their responses are treated anonymously.

3.5   Validity of Data Collected

Tashakkori and Teddlie (2003: 362-370) identified 12 decisions regarding data analysis which the researcher using the mixed method, should consider before the concept of validity is entertained. These decisions are:

- The purpose of mixed methods research
- Whether a variable-oriented or a case-oriented variable should be used
- Whether to use exploratory or confirmatory data analysis technique
- Which data types should be used
- What the relationship between qualitative and quantitative data types is

- What data analytical assumptions underlie the analyses
- What the source of typology development is
- What the nominations source of typology development is
- What the verifications source of typology development is
- What the temporal designation for the data analytical procedure is
- Whether computer software should be used to analyse the data and
- What process of legitimating should be used

The purpose of this is to answer the primary question raised in chapter 1 which is 'Why are management trainees not transferring learning to the workplace?' This study was confirmatory dominant and less exploratory in nature because it started with a literature study to determine what research says about the concept of transfer of learning and to identify the constraints thereof. Then a questionnaire was designed from the constraints identified from the literature study, management trainees completed the questionnaires, a sample of learners was interviewed from those who completed the questionnaire as a way of confirming the responses and finally the specific stakeholders on training were invited for a focus group interview which had as its objectives to confirm the hypothesis as described in chapter 2, the data collected through questionnaire and one on one interview.

According to Tashakkorie and Teddlie (2003: 168) a typology development involves the analysis of one data type that yields a set of substantive categories or themes that is subsequently applied to the analysis of other data types. In this study a literature study was used as a source of typology because the study first determined what research says about the constraints of transferring learning to the workplace and the identified constraints were then incorporated on a questionnaire. The source of data collection is literature study, which directed the study to the concept of *transfer of learning* used in this research and an empirical study of management trainees and their mentors. Since a computer software programme was not used, the quantitative data were analysed manually using hand tabulations.

3.6   Data Analysis Process for Mixed Method Research

The Tashakkori and Teddlie (2003: 297) data analysis process was used to analyse the data collected through interviews and questionnaire. Their method is complex as illustrated in figure 3.2 below; the study did not utilise all the components of the model. For the purpose of this study some aspects of the model were selected because of their relevancy and usability. In this study data were collected using the mixed research method as explained in chapter 2; the quantitative data collected were displayed using coding tables while the qualitative data responses were consolidated and analysed using an interview guideline.

The study did not bluntly follow the complex process as outlined, only concepts that are related to the confirmatory data analysis technique were used, especially concepts mentioned in the paragraph above. Concepts such as data integration, data consolidation, data transformation and data correlation were given less attention.
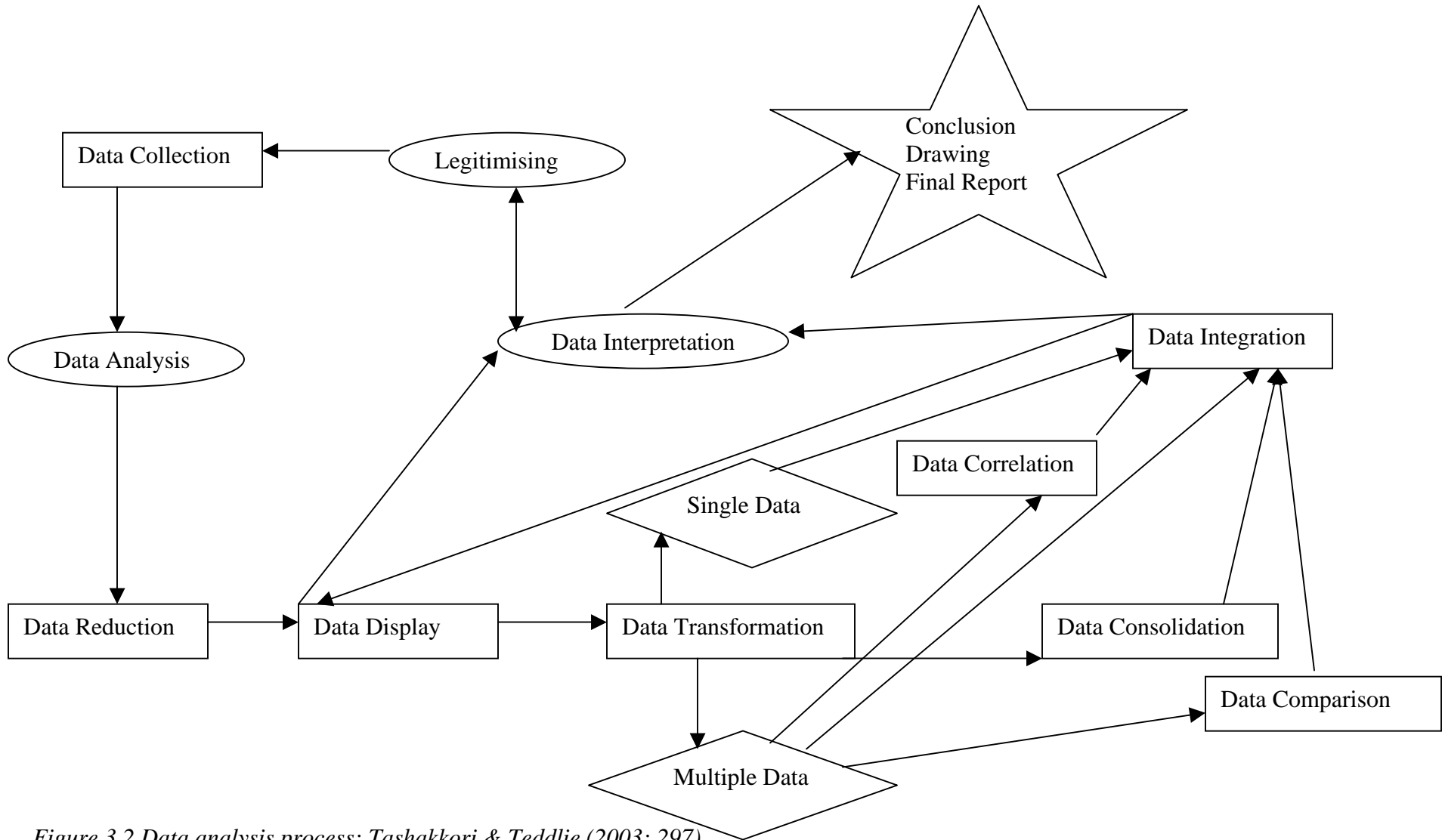
Figure 3.2 Data analysis process: Tashakkori & Teddlie (2003: 297)

3.7   Triangulation as a Data Analysis Method

The purpose of using the mixed research method has been explained above and partly in chapter 1; however for the purpose of clarity, the mixed research method helps to triangulate data collected through literature study, questionnaires, interviews and focus groups.

Erzberger and Kolle in Tashakkori and Teddlie (2003: 459) define the original meaning of triangulation as a method for determining the yet unknown position of a certain spatial point through measurement operation from two known points. They further indicate that triangulation has acquired two different meanings in the social science methodological debate which are remote from the original meaning. The first approach is the idea for supplementing qualitative research by the application of statistical methods to further validate findings. The second meaning is that triangulation is that of examining a physical object from two different angles or viewpoints that may provide a full picture or more complete image.

This study adopted a third meaning used by Erzeberger and Kolle in Tashakkori and Teddlie (2003: 462) of defining the triangulation component. They define the points as statements or propositions and the lines between the points as logical relations.

According to Creswell (2002: 571) a triangulation analysis technique can be done in two ways; the first is to provide discussion about the themes emerging from the data and how they support or refute one another. The second way is to combine the qualitative and quantitative data to arrive at a new variable or new theme for further testing or exploration. For the purpose of this study the first proposition used was a literature study and then an empirical research to identify the possible constraints and to determine whether the constraints are applicable to the Morula Sun Hotel trainees through questionnaires validated by one-on-one semi-structured interviews and focus groups.

3.8   Conclusion

According to Leedy (1997: 165) a choice of research methodology is done on the basis of purpose of study, resources, time frame and expertise. For the purpose of this study I selected an approach involving both qualitative and quantitative strategies. The mixed research method is starting to get recognition among researchers although not much has been written on this approach.

CHAPTER 4: RESEARCH FINDINGS AND DATA ANALYSIS

4.1   Introduction

The purpose of this study is to define the concept of Transfer of Learning, identify the constraints of transferring learning to the workplace and to suggest a framework that will be used to eradicate the constraints of transferring learning to the workplace. Chapter 3 defined the research methodology used for this study; Chapter 4 will discuss the findings and analysis of data collected through questionnaires, semi-structured interviews and focus groups.

According to Ary et al., (2002: 465) data analysis is a process whereby researchers systematically search and arrange the data in order to increase their understanding of the data and to enable them to present what they have learned from others. Ary et al. (2002: 465) further suggest that to simplify the complexity of data analysis, it is best to break the data down into manageable steps which are organising data, summarising data and interpreting data.   The aim of data analysis is to provide answers to questions raised in chapter one, determine whether there is any agreement between the literature study findings, questionnaires and the interviews. The triangulation data analysis method was used to complement the mixed research methodology used to collect data.

Data analysis for quantitative and qualitative research methods was done independent of each other. First the questionnaire raw data were coded, qualitisised, integrated with the qualitative data and then finally interpreted. A coding table was used to organise the quantitative data collected through questionnaires and summarised through a pie chart and line chart as depicted in page 57 to enable the interpretation.

4.2   Quantitative Data Analysis

4.2.1   Questionnaire Data Display

The respondents were asked to select the appropriate response, ranking it from *strongly disagree, disagree, neutral, agree* to *strongly agree*. The responses were then encoded on the self-made table and hand tabulated. A pie and a line chart indicating the frequency of the responses were prepared which highlighted whether the factors listed in answer to the questions can be categorised as constraints of transferring learning to the workplace. The pie chart (see figure 4.1) provides an analysis of the sections summarising the number of responses per scale (agree or disagree). The line chart (see figure 4.2) provides an analysis of each question within the sections highlighting the trends of respondents per question.

4.2.2   Demographical Data

The information in the first section of the questionnaire was collected from the employer and confirmed during the interview. Not all management trainees confirmed their personal details as some did not complete the questionnaires; the correctness of the ones who responded guaranteed the correctness of those who did not respond. The objective of this analysis was to transform the information into data which help in understanding the responses of the respondents for the next three sections. On an observational point, the sample of those who responded in the questionnaires seems to represent the general population of all management trainees.

It emerged that the majority of the respondents who completed the questionnaire have 5 to 10 years experience, are on a junior management level, are black male dominated and their education level is distributed from below Grade 10 to diploma level with a difference of one. Below is a table representing the biographical data for the trainees who completed the questionnaires:

CATEGORY	GENDER		MANAGEMENT LEVEL			EDUCATION LEVEL					WORK EXPERIENCE		
Titles	M	F	Mid	Jun	Sup	Below	Gr 12	Certific	Dipl	Degree	6 - 10	11 - 15	16 -
Survey	9	8	2	11	4	3	3	3	5	3	6	10	1
Expected	19	15	2	16	15	8	10	7	6	3	13	16	5
Difference	- 10	- 7	0	- 5	-11	- 5	- 7	- 4	- 1	0	- 7	- 6	- 4
Percent	47%	53%	100%	68%	27%	38%	30%	43%	83%	100%	46%	63%	20%

Table 4.1: Demographical data display

4.2.3   Training Factors as Constraints to Transfer of Learning

Below is a pie chart summarising the responses of trainees who completed the questionnaire. The chart indicates that 91% (made of 66% *agree* and 25% *strongly agree*) of the sampled population suggests that training factors are not constraints to transfer of learning. The statements were phrased in such a way that the highest response on *strongly agree* and *agree* is an indication that these factors are not constraints to transfer of learning to the workplace. A *neutral, disagree* and *strongly disagree* suggests that the factors are indeed constraints to transfer of learning.
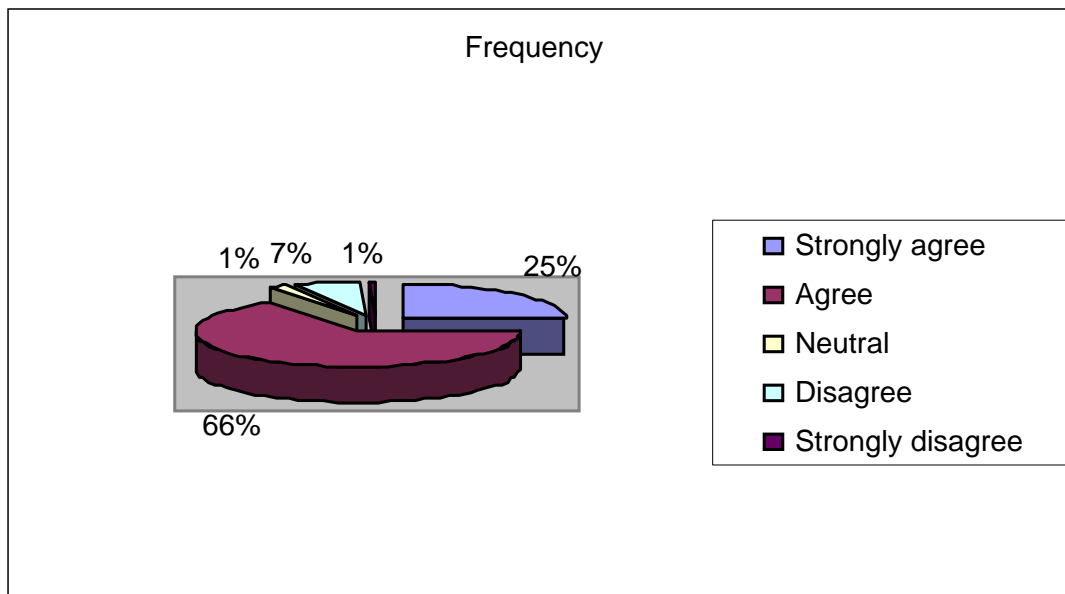

Figure 4.1: An analysis of training factors using a Pie graph

The line chart below further scrutinises the responses to indicate which aspects of the questions are the actual constraints to account for 9% (made of 7% *disagree*, 1% *neutral* and 1% *strongly disagree*) of the responses. Questions 5, 7, 8 and mostly 6 seem to be represented on the *strongly disagree* and *disagree* arena. Question 6 was highest by 5% *strongly disagree*, 25% *disagree* and 11% *neutral*. It can be inferred here that although the training was good the training content was not linked to the workplace roles and responsibilities of the trainees.
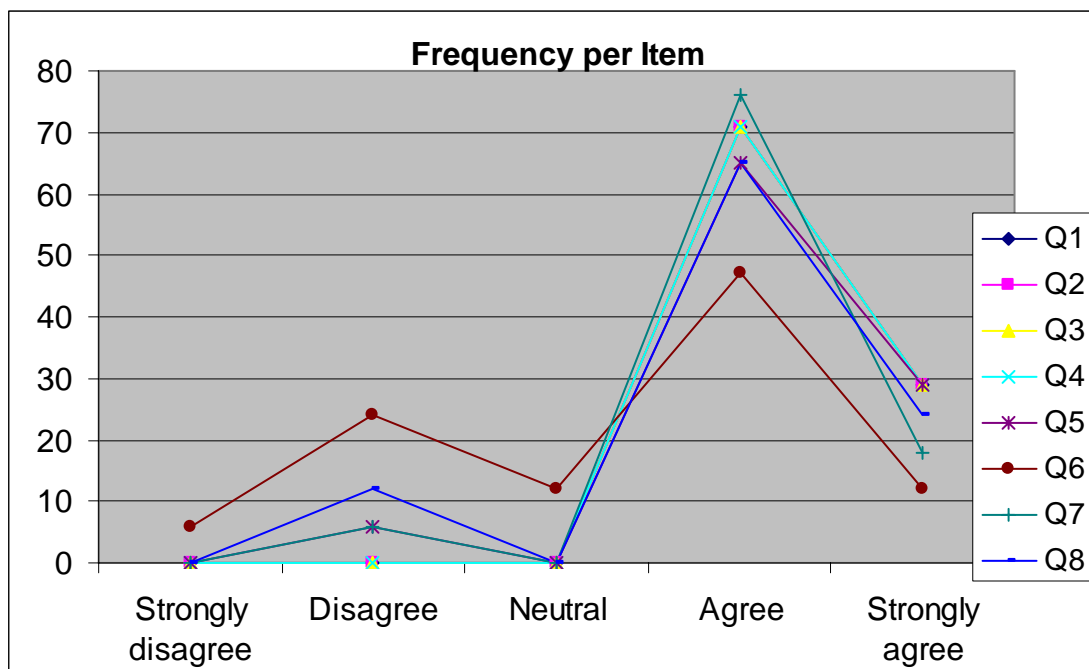
Figure 4.2: An analysis training factors using a Line graph

4.2.4   Learner Factors as Constraints to Transfer of Learning

The questions relating to learner factors were structured in such a way that the *strongly disagree, disagree* and *neutral* suggest that the factors as described are not the constraints to transferring learning. The high response rate on *strongly agree* and *agree* suggests that the factors as phrased through the questions pose indeed the constraints to transfer of learning. The pie chart below indicates that 74% (made of 51% *disagree*, 22% *strongly disagree* and 1% *neutral*) of the respondents suggest that the learner factors cannot be entirely inferred as the constraining factors to transfer of learning to the workplace.
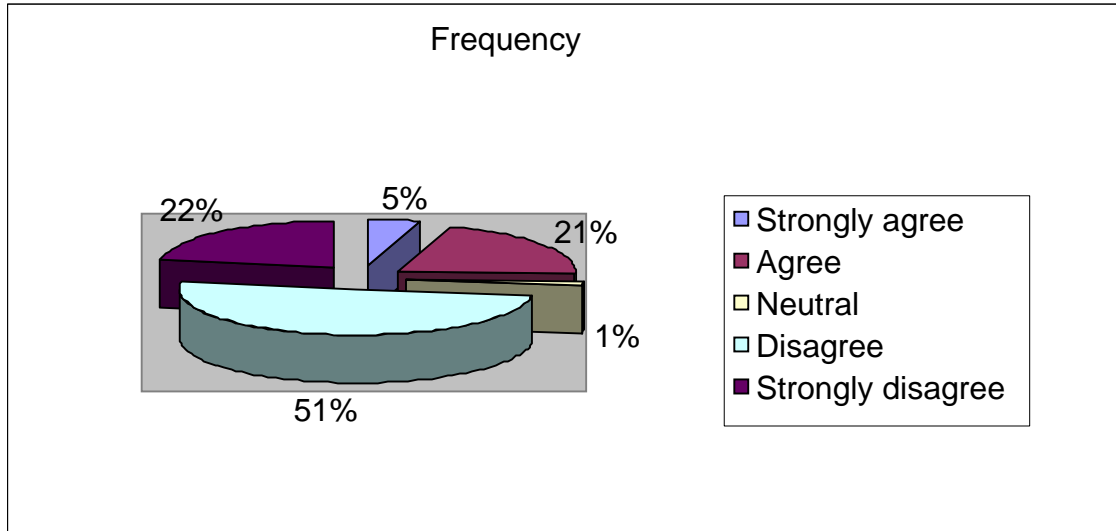
Figure 4.3: An analysis of learner factors using a Pie graph

To be able to determine which specific questions could be described as constraints from the learner perspective, a line chart was used to provide a specific analysis. Question 11 and 13 seemed to be a concern for 30% of the respondents. Question 11 is concerned with trainees' attitudes toward being selected for training by their managers rather than volunteering themselves, while question 13 is concerned with the trainees' attitudes toward transferring training to the workplace. It can then be inferred to some extent that they would have preferred to have volunteered for the AMDP and to have influenced what should be included as training content.
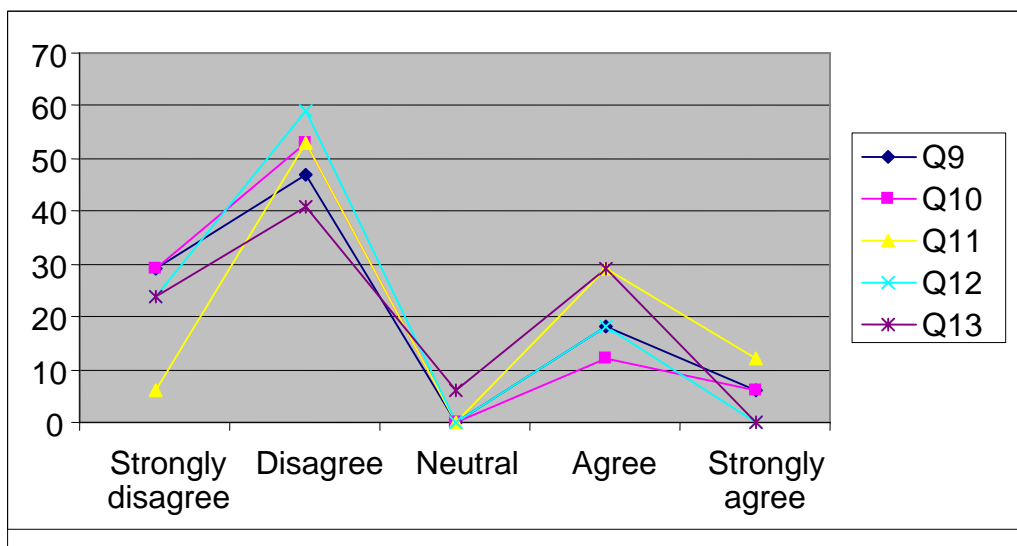
Figure 4.4: An analysis learner factors using Line graph

4.2.5   Organisational Factors as Constraints to Transfer of Leaning

The following questions were structured in such a way that a *strongly agree* and *agree* suggest that organisational factors are not the constraints to transfer of learning whilst *strongly disagree*, *disagree* and *neutral* suggest that organisational factors are indeed the constraints to transfer of learning. A pie chart below indicates that 82% (made up of 58% *disagree* and 24% *strongly disagree*) of the respondents suggest that organisational factors are very important reasons why management trainees do not transfer what they learned to the workplace.
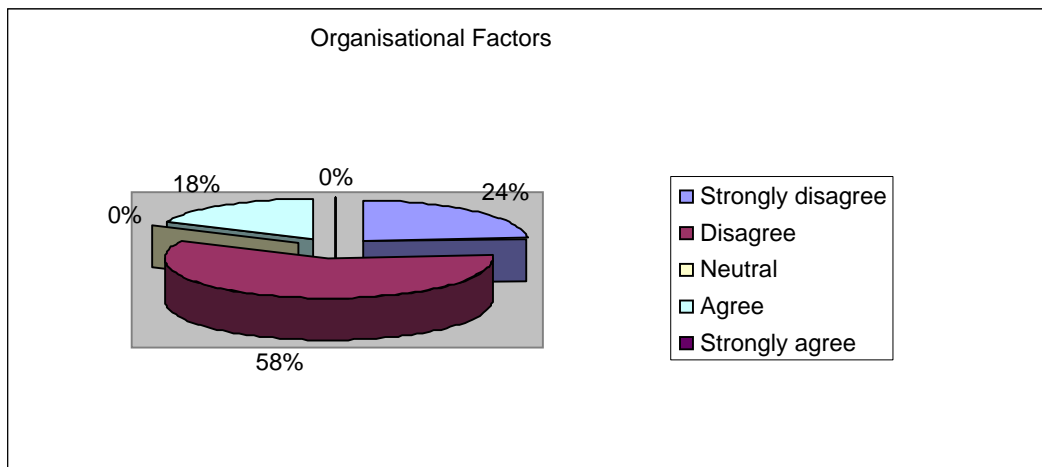
Figure 4.5: An analysis of organisational factors using a Pie graph.

The line chart below further provides an analysis of which factors have a high impact as constraints to transfer of learning.   Question 18 and 19 are top of the rank rating 65% each as the constraints to transfer of learning followed by 16, 15 and 14, rating 59%. Question 17's rating suggests that it is not a constraining factor. This implies that respondents have not identified a lack of implementation opportunity as a constraining factor.
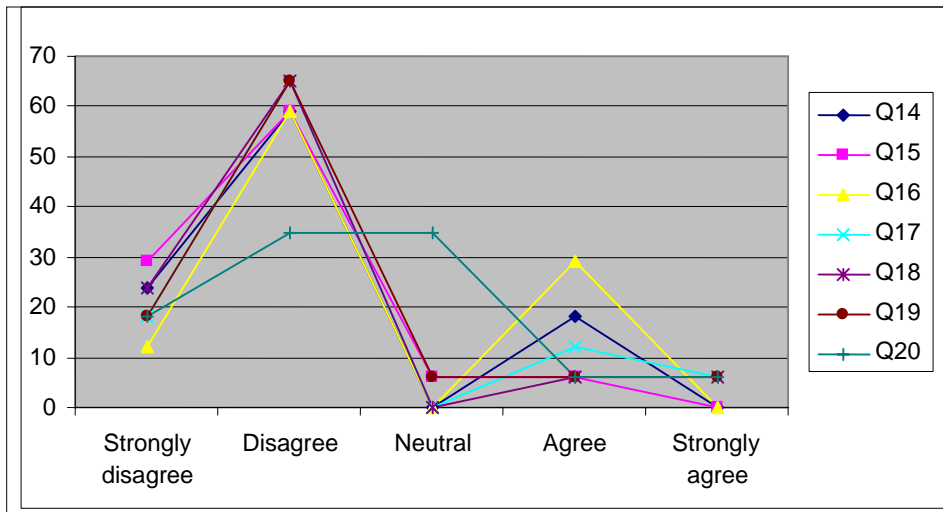
Figure 4.6: An analysis of organisational factors responses using a Line graph.

4.3 Qualitative Data Analysis

4.3.1 Semi-structured Interview Data Display

According to Brown and Dowling (1998: 72) an interview enables the researcher to explore complex issues in detail; it facilitates the personal engagement of the researcher in the collection of data and it allows the researcher to provide clarifications to probe and prompt. Interviews were used to clarify the responses of the trainees to the questionnaires.

The participants were asked five similar questions with room to probe or clarify answers. The questions were centred on their understanding of the AMDP programme purpose, the content, the mentor support and the applicability of the content to the workplace. Their responses have been consolidated and are displayed below.

Reponses per Question

1.   In your understanding what is the purpose of AMDP?

Question one tested whether the trainees understood why they were attending the AMDP because knowing the purpose of the programme serves as a foundation for transferring learning to the workplace. 10 out of 11 respondents showed an understanding of the purpose of AMDP even though they announced a different version of the purpose individually. This is an indication that they understood why they attended AMDP as a foundation for transferring learning to the workplace.

2.   To what extent has the AMDP equipped you to achieve this purposes?

Question 2 was intended to determine the understanding of the training objectives, personal needs as well as the ability to meet the demands of the respective positions of the trainees toward the training which has an impact on transferring learning to the workplace. Out of eleven trainees interviewed only one indicated that the AMDP equipped him to a limited extent while 10 indicated that they indeed benefited from the training.

3.   What are you doing differently that you can relate directly to what you learned during AMDP training?

The purpose of this question was to solicit different actions that can be attributed to the learning; a follow-up question was asked to clarify whether what they listed was indeed new, a continuation of what they were doing before training. Responses received to question 3 include the following;

- *Being assertive*
- *Building a relationship with my teams*
- *Made proposals to improve Morula Health and safety compliance*
- *No longer stress about own performance*
- *Plan and manage time effectively*
- *No longer procrastinate and apply preventative rather than punitive measures*

- *Give time to my team so that I can understand them better and help them with their personal and work-related problems*
- *Have regular meetings with my team and give them constructive feedback*
- *Support my team and give them appreciation a for job well done*
- *I listen to my team and give recognition for their input and proposals*

4.   In what ways do you receive support from your managers to apply what you have learned from training?

Here trainees were challenged to say whether they receive support through mentorship or coaching from their managers. This question is linked to the organisational factors as constraints to transfer of learning to the workplace. One out of eleven trainees receives support from her managers. The mentor and the trainee have developed an action plan and they meet every week to review her progress. During their progress meeting, the trainee reports back on things that she did, the problem encountered and areas of focus for the next week. The mentor gives feedback and coaching whenever necessary. What is surprising here is that another trainee mentored by the same person indicated that she does not receive support. She alleged that there is favouritism. The trainees' responses positioned question 4 as being problematic and possibly a constraint to the transfer of learning.

5.   What further problems or factors might prevent you from transferring what you have learned on the AMDP?

This questioned was asked to determine whether there are any constraints apart from the ones raised by the responses. The majority to the responses to these questions are centred round the issues that can be equated with organisational factors.   The answer from trainees included amongst others the following:

- *Lack of opportunity to implement*
- *Lack of support from their teams or managers*
- *No recognition of hard work and excellence*

- *The manager did not attend the training; as a result he does not know the importance of that training*

4.3.2   Focus Group Interview

As explained in chapter three, the focus group was made up of the Morula Sun Hotel training personnel and the operational managers who served as mentors. Below are their responses to the questions raised. The responses were written verbatim on the flipchart and transferred to the writing pad. The only editing done, was leaving out taboo words as at times the interview became emotional with participants accusing one another.

4.3.2.1 Questions and Response Display

Question 1

The Morula Sun Hotel embarked on an Accelerated Management Development Programme (AMDP) and 34 management trainees were nominated for the programme mostly from previously disadvantaged backgrounds.

In your understanding, what was the purpose of the AMDP training?

Answers

JD – I think the purpose of AMDP was to equip management trainees with knowledge, skills and desire to improve their work performance.
TC – We train the management trainees to avoid wastage, treat the clients with respect, and discipline their subordinates appropriately and general cost savings.
B C – We want the trainees to be productive and identify problems earlier.
JM – They should work smart and make effective decisions.

Question 2

To what extent has the AMDP training equipped management trainees to achieve this purpose?

Answers

TC – If you ask me the training was a waste of time, they were on holiday.

MM – My protégé did not understand a thing about training; I don't think the training was properly conducted.

JD – You are blaming training but I have test results proving that 85% of the trainees have passed which to me is an indication that the training has achieved the purpose. A lot of work is with you to make sure that they implement what they learned.

BC – What must we help them implement because they have learned absolutely nothing.

JD- Do you want me to test your trainee to see if he has learned nothing? In anyway I have asked them about the support they are getting from their mentors (referring to you guys) of whom they said you do not mentor them or give them opportunities.

AW - No they want us to do the work for them, we have learned the hard way and they should do the same.

JK – I think my trainees are doing well, it is tough for them but they are improving.

Question 3

If you think about those trainees what do they **do differently** that you can relate directly to what they have learned on the AMDP training? Please elaborate and give specific examples *(Follow up questions: How has job performance changed or improved? What have they started doing? What have they stopped doing? Have there been changes in behaviour, attitude or skills or noticeable differences in their sections as a result of the course?)*

Answers

TC – Nothing

BC – No comment

JD – I have seen improvement because some trainees visit my office occasionally asking about work-related issues. Some have even requested external training which to me is an indication of a willingness to change and even to further develop themselves

MS – Not all trainees act the same, in my case I am mentoring three of my pit bosses, one of them is negative and I have not seen any project submitted to training. When I ask her how was training she says it was very bad and the trainers presented courses poorly. The other trainee is sharp and I have signed his entire project, he comes to my office now and then for assistance. I think if there is someone to help it will be him. The other trainer is intelligent but not committed I would say she is average.

JK – My trainees are trying very hard I suppose they experienced problems during training and indicated that it was lot of work for them in a short of time

MM – Our work is straight forward, you have to know the Fidelio system and be nice to customers so it is very difficult for me to say my trainee has improved or not

Question 4

In what ways do management trainees get support from their senior managers to apply what they have learned when they return to the workplace?

Answers

JK – we are always there and I have given my trainees numbers to call me at home any time of the day so that I can assist the m when they struggle.

BC – I sit with all my guys and ask them what problems are they experiencing and always tell them that if they need help my door is open but no one comes to me.

TC - If you ask me my staff particularly those who attended training are lazy, incompetent and I blame who ever promoted them to supervisory or management position. I hope that

what I am saying is going to stay in this room it will not be used by the Union. The so-called employment equity is overloading us with lots and lots of work.

MM – although I do not agree with Tony, training does not ask us what the relevant training to solve our problems is; they decide what is important and tell us who they want.

JD -I sent a TNA questionnaire asking you what is your training needs, for this year only two managers responded and what must I do, I have work to do and I am being measured at how much I deliver and as for who comes on training, I send out the programme invitation and I receive nominations so you can't say I choose who come on training.

Question 5

What problems may be preventing management trainees from applying everything that they have learnt on the programme?

Answers

JM – I think our discussions have indicated that we (the managers) should be involved in what is to be trained, who is to be trained, when is training to take place and get involved.

JK – to me the problems is that we do not know what formed the content of training, who decided on the content and what is expected of us.

4.3.2.2 Focus Group Response Analysis

The analysis of the responses from question 1 suggests that all the participants agree that the purpose of AMDP was to ensure that management trainees improve their performance. Question 2, however, shows differences of opinion from operational managers and training. Operational managers think that the training was a total waste of time and the content was not aligned to the trainees' responsibilities whereas the trainers think that the training was successful especially that learners were tested. Question 3 suggests that the operational managers do not agree about whether there was

improvement or nor at the workplace. The responses show that only two out of five said there was no significant improvement; one indicated that there was improvement, one did not comment and one indicated that the nature of the work does not indicate whether there is improvement or not. Responses to question 4 suggest that operational guys view mentoring and coaching differently from what training expects them to do. Responses to question 5 suggest that the participants only viewed the factors listed in question 1 to 4 as the main constraints of transferring learning.

From the focus group responses it can be concluded that the training factors serving as constraints include the following:

- Training content dissociated from reality of work, non-involvement of operational managers to select content, trainees and implementation action plan.
- The trainee's negativity, passiveness and unwillingness to improve themselves.
- The mentor's negativity towards helping trainees, no structured mentoring plan and no opportunities for trainees' to implement.

Triangulation of Literature, Quantitative and Qualitative Findings

Now that the findings have been discussed above, a triangulation data analysis will be done in the following paragraph. The triangulation will focus on the literature study, qualitative and quantitative approaches.

4.4.1   Constraints to Transfer of Learning as Identified by Various Authors

The following factors have been identified from literature study as the constraints to transferring learning to the workplace.

- Sussman (2002) and Thack (2002) have identified lack of coaching as a constraint of transferring learning to the workplace.
- Hugget (1998) and Orvando (1994) identified lack of constructive feedback as a constraint to transfer of learning.

- Melahi (2000), MacFairlin et al. (1991), Swarts and Davis (1997) identified culture as a barrier to transferring learning as it is sometimes difficult for learners to understand western culture if they live by African principles.

- Meldrum and Atkinson (1998) pointed out that the problem of not applying what has been learned does not necessarily lie with training design and implementation but with organisational issues.

- May (1999) and Adele and Thanika (2002) maintain that learning dissociated from real life experience is a barrier to effective transfer of learning. They instead believe in action-based learning, such as meaningful and risky managerial task and sharing the learning experience with others.

- Rothwell and Kazanas (1988) believe that learning interventions are usually geared to historical or past career patterns or those theoretically dissociated from real life experiences.

- Paauwe and Williams (2001) and Kamoche (1997) are concerned with the selection criteria of the trainees. Kamoche (1997) maintains that those that are selected for training are not necessarily those who need it most and that the selection is left at the hands of senior managers who sometimes choose their favourite subordinates instead of someone with potential.

- Peter Goodge (1998) notes the organisational context has changed with rare upward job moves which leaves the trainees with new skills but without job mobility to complement the applications.

4.4.2 Summary of Questionnaire Findings

An analysis of the questionnaires completed by the trainees revealed the following:
- The content was not linked to the roles and responsibilities of the trainees as their responses to question 6 and depicted by figure 4.2.
- Selection criteria seem to be a problem for the trainees as per their responses to question 11 depicted in figure 4.4.
- Again the trainees maintain that the content is not useful at the workplace as per their responses to question 13 and depicted on figure 4.4.

- Coaching and feedback were identified as the major constraints for trainees as per their responses to question 18 and 19 and depicted on figure 4.6.
- Other constraints include action plan, opportunity to implement and adhering to a mentorship process.

4.4.3   Summary of the Interview and Focus Group Findings

An analysis of interviews and focus group responses identified the following constraints:

- Support through mentorship, coaching and feedback is lacking.
- Learners are not taking initiatives to improve their performance.
- The content of training is not linked to the roles and responsibilities of trainees.
- Lack of opportunity to transfer learning o the workplace.

4.4.4   What is the Third Variable?

A triangulation of the literature study and qualitative and quantitative data reveals that there are similarities of factors or constraints identified and some differences as depicted in figure 4.7 below. The differences include culture, job mobility, outside-in approach, team support, competencies and learner language and readiness for training. The similarities include content dissociated from reality, lack of coaching, mentoring, and lack of opportunities to apply what has been learned.

```
┌─────────────────────────────────┐
│ C: Third Variable               │
│                                 │
│       • Content                 │
│       • Coaching                │
│       • Mentoring               │
│                                 │
└────────────────▲────────────────┘
┌──────────────────────┬──────────────────────┐
│ A: Literature Proposition │ B: Empirical Proposition │
│   • Training Factors    │   • Content           │
│   • Organisational Factors│ • Coaching          │
│   • Learner Factors     │   • Feedback          │
│                         │   • Opportunity       │
│                         │   • Learner initiatives │
└──────────────────────┴──────────────────────┘
```
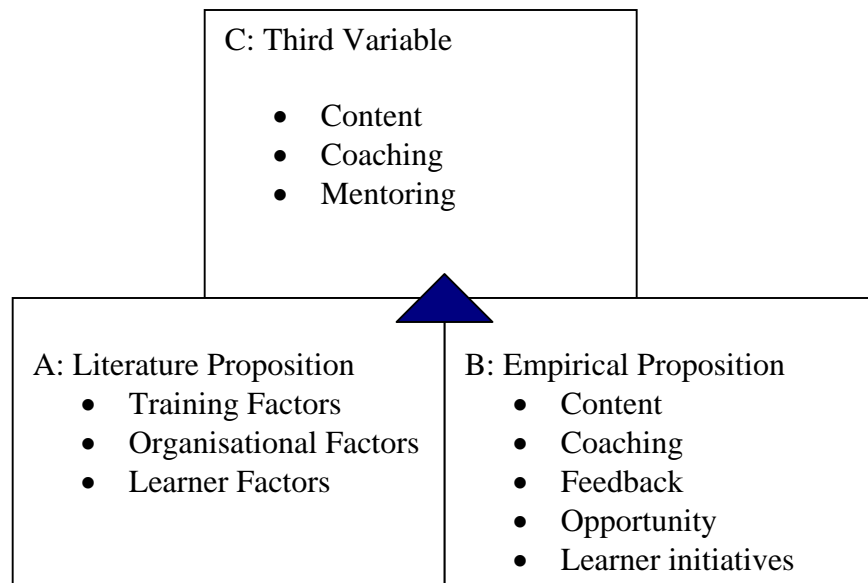
Figure 4.7 Triangulation of literature and empirical findings

4.5   Conclusion

The constraints of transferring learning to the workplace have been identified through literature and empirical study. It has emerged that training content, coaching and mentoring are the major constraints to transfer of learning. There is a need for a framework that would suggest ways and means to deal with the constraints as identified above. The next chapter will focus on recommendations to alleviate the constraints.

.

CHAPTER 5: CONCLUSION AND RECOMMENDATIONS

5.1.   Introduction

Chapter 4 has laid down the findings of both the literature study and the empirical study in context. Chapter 5 will now provide an executive summary and recommendations for dealing with the constraints to the transfer of learning. It is necessary to restate the problem to determine whether the questions have been addressed adequately in this chapter.

5.2   What is the Conclusion of this study?

It is essential to determine whether this study has answered the questions raised and achieved the objectives stated in chapter1.

5.2.1   Critical Questions raised in Chapter 1

The following questions were asked:
1. What constitutes successful transfer of learning to the workplace?
2. What constraints of transferring learning to the workplace are experienced by management trainees?
3. What is the relation between trainees' current performance and the constraints of transfer of learning?

Question 1 dealt with definition and the extent of the concept '*transfer of learning*'. For the purpose of this study; transfer of learning was defined as putting into practice the skills, knowledge and attitudes that were gained through learning intervention by either classroom or on the job training. A further discussion of how transfer of learning has been measured by other researchers was made. Donald Kirkpatrick's Four-Level of Evaluation taxonomy was discussed as a popular measure of transfer of learning. It was mentioned in chapter 3 that the questionnaire was designed to measure Level 1 and 3 trainees' satisfaction with the training and the change in behaviours at their workplace.

Level 2 (what have they learned and Level 4 (business results) were not incorporated in the questionnaire but were measured through semi-structured and focus group interviews.

The second question posed was concerning the constraints of transferring learning to the workplace. In chapter 2, a detailed discussion on the constraints was made and in chapter 4 a summary of those constraints identified from literature study was listed. The literature study was complemented by the empirical findings done by means of the questionnaire and semi-structured interviews which indicated that the management trainees experience some of the constraints.

The third question posed focused on the relations of the trainees' work performance and the constraints to transfer of learning. The relations were determined through the focus groups and semi-structured interviews. Management trainees and their mentors acknowledged that they do not perform as they are supposed to. The implications here are that there is a relation between poor performance and the constraints identified.

This study has shown that some research has been done in the field of transfer of learning and some researchers have identified some of the constraints preventing transfer of learning to the workplace. The study has confirmed some of the constraints identified by other researchers in different settings. At the Morula Sun Hotel the most common constraints are lack of mentorship and coaching, lack of opportunities for applications, the content of training dissociated from reality and lack of commitment from learners.

The literature revealed a need for synergistic relationships between the trainees, trainers and operational managers in everything they do for training and development purposes. If they all work in silo, the result will be counter productive and blaming one another as illustrated by the focus group findings and the management trainees' interview findings. A suggested framework to eradicate the transfer of learning has been depicted through figure 5.1 in page 78.

5.4   Recommendations

It must be noted that although constraints have been identified, the Morula Sun Hotel has a dedicated and committed team which includes management, training personnel and trainees. This implies that there is a potential for development and if the recommendations listed below are implemented, the organisation will definitely benefit from them.

5.4.1   Some aspects to note from the Literature Study

- Trying to justify why learners do not transfer learning to the workplace, Howe (1984: 14) observed that young and immature students do not spontaneously transfer learning to new and different situations; they have to learn to do so. Often considerable help and encouragement from the trainer or mentor is needed before a student will start to make use of new skills in any circumstances that are at all different from those in which they were first acquired. The habit of acquired learned abilities is not gained without experience and assistance.

- There is a need for conducting an in-depth observation study for the relation of management trainees' performance and the constraints to transfer of learning. The study should first tabulate the expectations of the trainees, mentors and training department so that the relations can be determined.

- This study was only done using a cross sectional approach and researchers such as Cheng and Ho (2001) and Creswell (2002) suggest a longitudinal study which implies that data are collected over a long period of time. The results will tell whether the training has had an effect or not in the long term.

- Stephen Covey (1996) maintains that the level of effectiveness is attained through an inside-out approach and it is clear from the research done that the respondents consisting of management trainees, mentors as well as the training department are outside –in oriented. This means that they all see the problem as being there, not as with them. For them to be able to apply an inside-out approach they should implement the seven principles of effectiveness:
    - Being Proactive – in every situation they have freedom to choose any response.

- o Begin with an end in mind – they should have a personal mission of everything they do and align it with their organisational vision.
- o Put first things first – they should give priority to things that are important rather than do things as they come.
- o Think Win/Win – In any relationship they should practise mutual benefit principles, especially with their mentors and seniors.
- o Seek first to understand and then be understood – they should strive first to listen to what is needed and respond after they have heard both sides of the story.
- o Synergise – Sometimes wanting to impress how good you are might land one into rejections, sabotage and sidelining. It is important to work for the benefit of the team rather than the individual.
- o Sharpen the saw – the training is not a once-off intervention; it has to be supported by constant contact between mentors, trainees and trainers to see what needs to be improved and how it can be improved.

- The most critical habit for this study is synergy; Covey (1989: 283) maintains that the relationship of the parts is also the power in creating the synergistic culture inside an organisation. He further states that the more genuine the involvement, the more sincere and sustained the participation in analysing and solving problems.

- The National Qualifications Framework laid down the guidelines that should be followed when assessing learners for competence. As mentioned in chapter 2, the NQF propagates applied competence which suggests that foundational, practical and reflexive competence should be the core of determining achievements.

- The major challenge for this study is the practical and reflexive competence as the foundation relating to knowledge, skills and attitudes acquired as a result of classroom training. Lack of coaching and mentoring entails the lack of application of learned knowledge and skills.

- The challenge for the framework is to maintain the balance between operational needs, the training needs and the individual's needs. Covey has indicated that there is a need for synergy between the relevant parties. Working together towards a common goal will reconcile each need into one and ensure that there is improvement in performance.

5.4.2 Recommendations to Deal with Factors Identified as Major Constraints to Transfer of Learning

5.4.2.1   *Organisational Factors (Mentoring, Coaching, Feedback)*

Mentoring, coaching and feedback should be formulated as part of an action plan before the learners are selected to attend training in the form of learning agreement. The action plan should be specific in terms of stating the outcomes of training and how each outcome will be implemented and measured. How often feedback will be given and the records of the feedback form part of the Portfolio of Evidence which must be used for a declaration of competence. The line managers should be responsible for conducting a needs analysis and be the deciding forces of what training is needed at the organisation. The managers should have an individual development plan for every employee who should drive the training and development of the organisation.

5.4.2.2   *Recommended Design for Training and Development Process*

It is recommended that all training interventions follow a standard design to alleviate discrepancies and inconsistencies that may arise when trainees go back to their workplace. The process should be watertight so that it can be measurable and ensure the return on investments. Throughout the process, there has to be an involvement of operational managers, training department and representatives of employees.

The table below reflect the process that could be followed to ensure that there is clarity for all parties involved in training and development. The aspects listed in figure 5.1 are not exhaustive; some aspects can be added to complement what has been mentioned in this figure. The figure depict that the training intervention should start at the bottom with training needs analysis and end with declaration of competence:
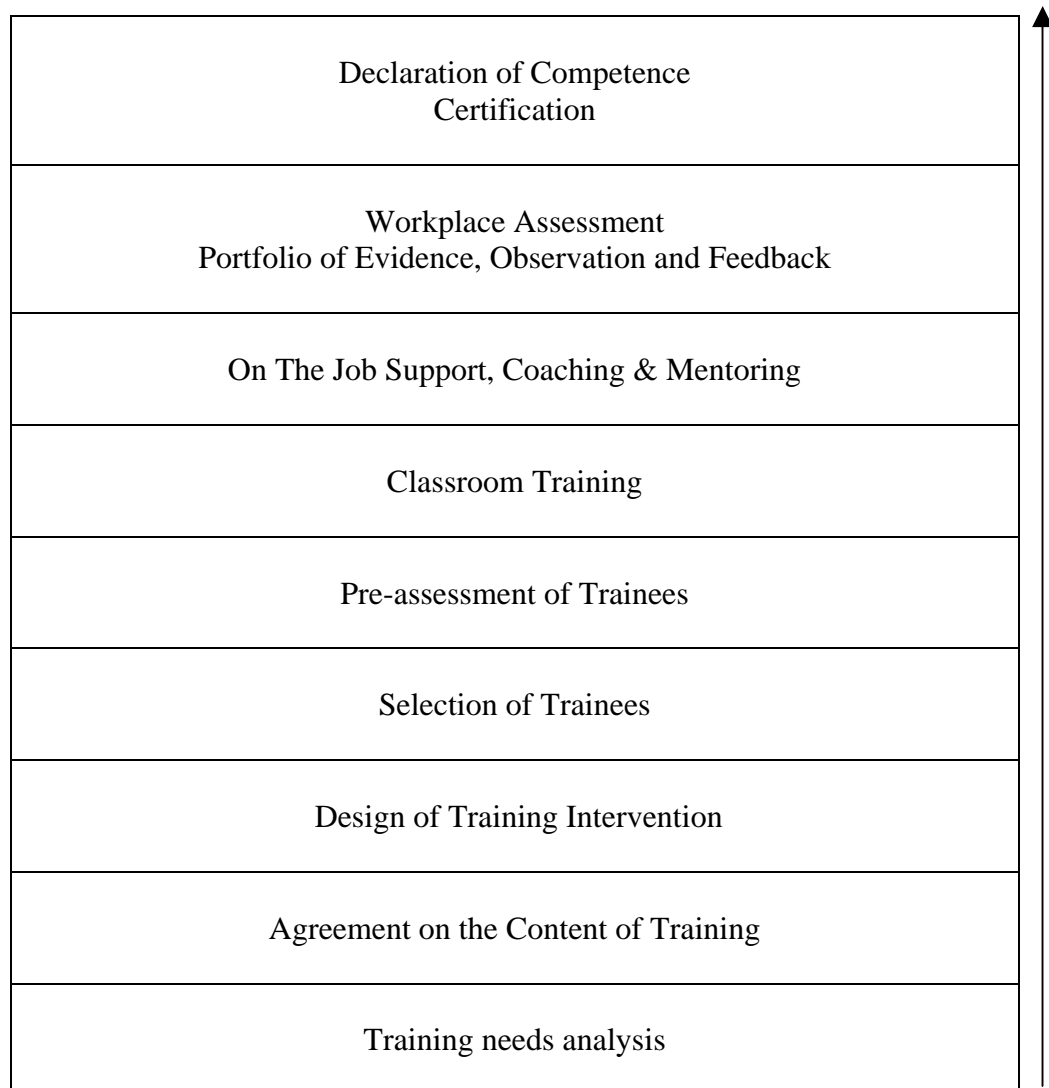
Declaration of Competence Certification
Workplace Assessment Portfolio of Evidence, Observation and Feedback
On The Job Support, Coaching & Mentoring
Classroom Training
Pre-assessment of Trainees
Selection of Trainees
Design of Training Intervention
Agreement on the Content of Training
Training needs analysis

Figure 5.1: Recommended design for Training and Development process to make provision for transfer of learning.

5.4.2.3   *Recommended Ways of dealing with Learner factors*

Covey's 7 Habits of highly effective people can be used to improve personal and interpersonal effectiveness of the trainees. Other programmes that might help include a prerequisite structured assessment session which would identify trainees needing extra attention.

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ADDENDUM A

THE ETHICAL STATEMENT

The purpose of this ethical statement is to inform that as a researcher, I have ensured that all research processes undertaken are conducted in accordance with professional and ethical procedures guided by the following principles:

- The study has not in any way violated the principle of human rights and dignity of the respondents.

- The respondents were duly informed before the research is conducted, during the research process and will be informed after the research has been completed and the publication of the articles.

- The approval request from participation was done through an email correspondence.

- The data collected from the participants will not be used for any performance appraisals, disciplinary measures or for any reward purposes, either promotional or monetary.

- The respondents were not exposed to any form of risks or dangers.

- The participation on this study was entirely voluntarily and respondents' identities and interest will be highly protected.

- If at any instance I am required to publish or use their names, a formal approval request will be made to the applicable participants.

1. Overview of the research

This research was an attempt to determine the reasons why learners do not transfer what they have learned to their workplace. In the study report, I provided a background to the study, explained the theoretical framework of transfer of learning, discussed the methodology employed to identify constraints, used triangulation methods to analyse data and gave a summary of findings and recommendations at the end of the study. The research data was collected through literature study, questionnaires, interviews and focus

groups. The data was analysed and a report given at the end. The main purpose of the research was to identify the constraints to transfer of learning to the workplace and suggest a framework that can be used to eradicate the constraints.

2. Participation of Human Respondents

This study involved the sample of seventeen learners selected for the interview and a questionnaire. A further sample of training practitioners, mentors and operational managers was interviewed in a focus group. The participants were employees at the Morula Sun Hotel who were involved in an Accelerated Management Development Programme. The sampling was done through non-probability sampling which implies that respondents were selected considering their willingness to be interviewed and their availability for the interview.

The participants were required to complete a 15 - 20 minute questionnaire relating to transfer of learning issues as identified from literature reviews. A 15-minute interview was arranged for each participant and they were asked personal background data, how each rated and perceived the AMDP training and the support from the organisation in general. A focus group for operational managers who mentored the trainees was conducted.

3. Subject Approval and Informed Consent

Permission was requested from the Morula Sun Hotel management to conduct research and the permission was granted by the Human Resources Manager. The respondents were briefed before they completed the questionnaires and before the interview about the purpose of the study and their role. They were informed of their right to choose whether to participate or not and that, if they did not feel comfortable by participating, they could withdraw anytime during the questionnaires or interview. The respondents were informed that the study would be conducted in English and advised about an alternative of using an interpreter but they all agreed to be interviewed in English.

I have completed Research Methodology 720 and 780 through university of Pretoria whereby a research paper was submitted for the purpose of BED. I have been administrating work related questionnaires and making reports. The guidance of a supervisor assisted in making this study professional and complying with the ethical code of conduct.

4. Declaration

I **SIMON TAKALANI RAMBAU (9627151)** understand what plagiarism entails and am aware of the university policy in this regard. I declare that this dissertation of limited scope is my original work. Where someone else's work was used (whether from printed source, the internet or any other source) due acknowledgement was given and reference was made according to departmental requirements. I declare that I did not make use of another student's previous work submitted it as my own. I did not allow and will not allow anyone to copy my work with the intention of presenting as his own work.

Signature ………………………………………………..

ADDENDUM B

SEMI-STRUCTURED INTERVIEW GUIDELINES FOR MANAGEMENT TRAINEES

Details of Respondent

Name	
Position	
Section	
Mentor	
Phone numbers	
Fax number	
e-mail	

Introductions to the students

I am a student at University of Pretoria studying for a Master's Degree in Education. My field of research is on transfer of learning to the workplace. I am going to have structured discussions with you about the AMDP programmes and the support you get from your mentors and other operational managers. You must relax because the content of discussions will not be used for any work-related activities such as disciplinary procedures or promotional reasons. You must know that you have the right to stop at any given time if you feel that the interviews make you uncomfortable for you and please feel free to ask in your mother tongue if you do not understand the questions. The interview will last for fifteen minutes and you may ask questions during the interview. I will write your responses down so that I can remember very well what you said, I will not use your name on the report that I will submit after I have interviewed all trainees.

QUESTIONS

1. Morula Sun embarked on an Accelerated Management Development Programme (AMDP).

    In your understanding, what was the purpose of the AMDP training?

    _____

    _____

    _____

    _____

2. To what extent has the AMDP equipped you to achieve this purpose?

    _____

    _____

    _____

    _____

    _____

3. If you think about the content of the training, what are you **doing differently** that you can relate directly to what you learned during the AMDP Training? Please elaborate and give specific examples (*Follow up questions: How has job performance changed or improved? What have you started doing? What have you stopped doing? Have there been changes in your behaviour, attitude or skills or noticeable differences in your sections as a result of the course?*)

    _____

    _____

    _____

    _____

    _____

4. In what ways are you getting support from your senior managers to apply what you have learned on returning to the workplace?

_____

_____

_____

_____

_____

5. What problems may be preventing you from applying what you learnt during the programme?

_____

_____

_____

_____

_____

_____

_____

ADDENDUM C

QUESTIONNAIRE ON THE TRANSFER OF LEARNING

Section A: Biographical Data

Respondents' Name _____ Number Allocated _____
Intervention attended _____
Intervention Facilitator _____
Workplace Mentor _____

1. What is your position?

Senior Manager	Middle Manager	Supervisor	Senior Employee	Employee
1	2	3	4	5

2. How long have you been working at the company.

0 – 12 Months	1 – 5 Years	6 – 10 Years	11 – 15 Years	16 + Years
1	2	3	4	5

3. What is your gender?

Male	Female
1	2

4. What is your race?

Black	White	Coloured	Indian	Other
1	2	3	4	5

5. What is your current level of education?

Below Grade 12	Grade 12	Certification	Diploma	Degree
1	2	3	4	5

6. What is your English language proficiency?

Very poor	Poor	Average	Good	Excellent
1	2	3	4	5

7. Please mark the number of the description that best fits your situation

I. This is your first training intervention at the Morula Sun Hotel	1
II. You have attended fewer than three courses since you started at the Morula Sun Hotel	2

90

III. You have attended less than ten training intervention at the Morula Sun Hotel.	3
IV. I have attended more than ten training intervention at Morula.	4
V. I can't remember how many interventions I have attended at Morula	5

Section B: Training Design, Implementation and Evaluation

7. Please rate the statements below. Tick the number that most accurately describes your response to the statement. Use the following guideline to respond to each statement:

1 = Strongly Disagree
2 = Disagree
3 = Neutral
4 = Agree
5 = Strongly Agree

EXAMPLE

QUESTION 1: The time of training was appropriate

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

1. I received an invitation to attend the Accelerated Management Development Programme a month before the actual training.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

2. I attended a briefing session wherein the objectives and the outcomes of the course were explained.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

3. I completed the pre-assessment questionnaires before the training was conducted.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

4. I received quality training handouts from the facilitator.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
○	2 ○	3 ○	4 ○	5 ○

5. We were given exercises to practise during the training session.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1 ○	2 ○	3 ○	4 ○	5 ○

6. The content of training was linked to the real workplace responsibilities and customised to real-life experiences.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1 ○	2 ○	3 ○	4 ○	5 ○

7. Assessment was done during training and after training.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1 ○	2 ○	3 ○	4 ○	5 ○

8. The level of training and content was appropriate.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1 ○	2 ○	3 ○	4 ○	5 ○

Section C: Learner Willingness and Readiness to Learn

9. People already working are not supposed to attend training.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1 ○	2 ○	3 ○	4 ○	5 ○

10. Training is for the subordinate employees, not managers.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1 ○	2 ○	3 ○	4 ○	5 ○

11. People should volunteer for training, they should not be chosen.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

12. I was not ready for training when informed to attend.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

13. Training is a total waste of time as what is learned will not be used at the workplace.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

Section D: Organisational Support

14. My mentor supported the training I attended.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

15. My mentor attended the training and knows the content very well.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

16. I was provided with an action plan to implement what I learned during training.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1	2	3	4	5

17. There is adequate opportunity for me to apply what I learned during training.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1 ○	2 ○	3 ○	4 ○	5 ○

18. The mentor provides regular feedback about my performance.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1 ○	2 ○	3 ○	4 ○	5 ○

19. I receive coaching from my mentor whenever I struggle with something work-related.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1 ○	2 ○	3 ○	4 ○	5 ○

20. The training will contribute to career mobility within the company.

Strongly disagree	Disagree	Neutral	Agree	Strongly agree
1 ○	2 ○	3 ○	4 ○	5 ○

ADDENDUM D

DATA CODING TABLE