

Factors Affecting Training Transfer: Participants' Motivation to Transfer Training, Literature Review

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This article investigates factors that motivate participants in learning and training activities to transfer skills, knowledge and attitude from the learning setting to the workplace. Based on training transfer theories hypothesized by Holton (1996), one of the major theories that affect an organization's learning is motivation to transfer theory. Shedding the light on factors such as positive expectation and self-efficacy might assist organizations' leaders to pay more attention to the needs of workers.

Keywords: Training Transfer, Theories of Transfer, Motivation to Transfer

Governments and organizations spend an enormous amount of money, time, and effort in order to train employees and workers. This training is aimed to balance the organization's requirements and the employees' needs. As Seyler, Holton, Bates, Burnett, and Carvalho (1998) point out, training is focused on trying to change a trainee's behavior or teach new behaviors to the individual trainee. Some organizations are concerned with training as a priority issue, whereas other organizations are concerned with the final product as their top priority. According to Olson (1997), there are over 20,000 trade and industry associations in the United States, representing much of the industry. But education and training are rarely their top priority.

The purpose of this article is to investigate factors that motivate participants to transfer training from the learning place to the working place. This study centers its attention on factors related to the participants first and the organizational climate second by reviewing the literature and research which have been conducted on training and development workforce.

Training transfer is affected by many factors, those that consist of the participants' characteristics, the design of the training program, and the work environment (Baldwin and Ford, 1988). Many studies have been conducted on these factors together; few of these studies take into consideration the participants and their motivation as an independent factor. This literature review is very important for practitioners, trainers, trainees and organization leaders in the field of Human Resource Development (HRD) for at least two reasons: first, any kind of training or learning should find an application in the real life. Johnson (2002) argued that contextual teaching and learning engage learners in significant activities that help them connect academic studies to their context in real-life situation (Johnson, 2002 p. 2). Second, learning and training transfer is not to be occurring without a positive organization culture and psychology climate. (Bates, R. and Khasawneh, S., 2005) indicated that the ability to learn, change, and innovate are considerable practical and theoretical significance.

In order to expand a better understanding of the purpose of this article, which is to investigate factors that motivate participants to transfer training, two questions were asked:

- 1) What are the main factors affecting participants' motivation to transfer training?
- 2) How could organizations enhance motivational factors and overcome barriers to transfer?

Method

Based on the theoretical framework suggested by Holton (1996), the researcher reviewed the literature related to motivation as a core factor in the learning and transferring process. The researcher has reviewed more than 30 articles, books, and other relevant material related to training transfer; the literature was selected and organized based on the theoretical framework of this study and was limited for the last 15-years. Terms such as learning, training, transfer, and motivation were utilized to search the following resources: (a) ERIC databases, (b) Internet search engines, (c) Academic Journals and books, (d) Dissertation Abstract International, (e) Inter Loan Library, and (f) Pro Quest, Psycho info, etc. A number of additional articles discussed motivation transfer for example, (Baldwin and Ford, 1988; Chen, Gupta and Hoshower, 2006), but most of those articles focus on organization climate, training transfer design, in addition to motivation in general.

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For a better understanding of this topic, we need to look at learning transfer theories such as expectancy theories, equity theories, and goal setting theory. For example, linking equity theory with some issues in the workplace such as salaries, work hours, vacations, size of the jobs and tasks should be equal which makes employees and workers think positively all the time. In addition to discussing those theories and their applications, it would be beneficial to know what some of the barriers that prevent learners from transferring what they learn in their jobs are.

Theoretical Framework

Based on Holton (1996), learning and individual performance are two outcomes that are considered a priority for HRD intervention. Holton assumed that for each training program, trainees do decide what they want to learn or not to learn. In other words, for employees who have the desire to learn, it is more likely for them to transfer that learning to the workplace. According to the model suggested by Holton, motivation is secondary but has direct influence on the organization's outcomes. Also, Holton suggests that HRD outcomes are hypothesized to be a function of ability, motivation, and environment influences (p.10).

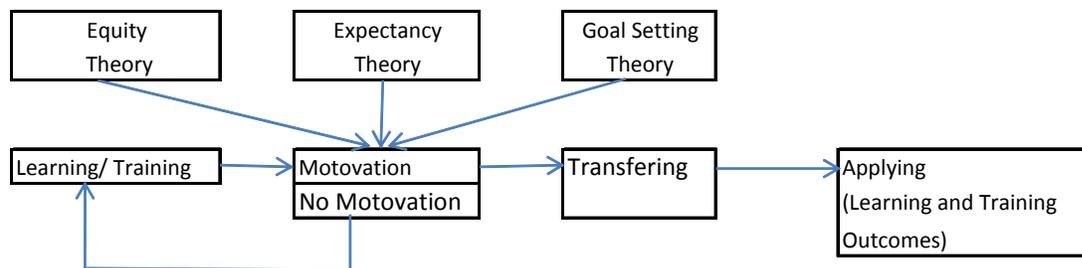


Figure 1. Linear model for learning and training transfer.

Figure 1 shows a linear model for the incomes (learning) and the outcomes (application). This model is directly affected by motivation theories. However, if the employee has the motivation, the desire, and the ability to apply learning and training in its context, that means the learning and training have achieved the final goal. Otherwise, training will be a waste of the organization's time and money.

Literature Review

This section discusses factors that affect training which may be divided into three categories: trainee characteristic, training design, and the work environment of the workplace (Baldwin & Ford, 1988). Despite the importance of the other factors, trainees' characteristics are considered a key factor of motivation to transfer.

Training is defined as the act, process, or method of one who trains. It is also defined as the knowledge or experience acquired by one who trains (*Merriam Webster Dictionary, second edition*). Rothwell and Sredl (2000) were more specific and defined training as a short-term intervention designed to change individuals by equipping them with the necessary and sufficient knowledge, skills, and attitudes they need to meet or exceed customer requirements and achieve results (p.9). Another definition came from Blancher and Thacker (1999) who defined training as a systematic process attempting to develop knowledge, skills, and for current or future job. Training aims to bring changes in the employee's skills, in addition to other changes in attitudes and knowledge. Skills might range from reading and writing to gaining skills in the computer's applications. Mingail (2004) reported that Human Resource and Skills Development in Canada define nine essential skills; those skills stretch far and beyond reading and writing.

Training transfer is defined as "the application continued by learners to performance of jobs, individuals, community responsibilities of knowledge in learning activities" (Broad, 1997, p. 2). In other words, transfer means that the learner is supposed to apply the new training in a new situation. Training employees is focused on the individual more than on the groups that is because of the nature of the final goal of training which equips the individual with all or most of the skills mentioned above (Sredl and Rothwell, p. 200).

Training Transfer Theories

Learning theories and training theories are aimed at finding the best ways of learning or training to be useful and applicable. A number of frameworks, models, and theories have been used to explore factors that effect training transfer. Learning theories work as guidance for improving performance and productivity in the workplace. Taking those theories into consideration when planning and applying training plans will make a positive difference in the workers, organizations, and design of the training.

Holton (1996) hypothesized that there are three theories on training transfer: motivations theories, theories for training transfer design, and theories supporting transfer climate. For the purpose of this study, and in order to answer the research questions, the focus is going to be on theories of motivation. This theory is categorized into three theories: equity theory, expectancy theory, and work setting theory (pp.482-489). To reach the desirable degree of transfer of training, it is important to understand why individuals choose to apply their knowledge, skills, and attitude in workplace (Yamnil and Mclean, 2001).

Expectancy theory. This theory is very similar to the behaviorism theory which was developed by John Watson, Ivan Pavlov, and B. F. Skinner which is explained as rewards or punishment for action (Rothwell, Sredl, 2000 p. 259), and based on certain behaviors that are followed by desirable outcomes. The competency theory is defined as the momentary belief concerning the likelihood that a particular act will precede a particular outcome (Vroom, 1964 p.17).

Chen et al. (2006) employed expectancy theory to examine the impact of various motivational factors on faculty research productivity. These results show that faculty with higher total motivation for rewards published significantly more articles than those with lower motivation for rewards. Other researchers derived a version of expectancy theory called exception, presented by Porter and Lawler (1968) which task view of the relationship between employee satisfaction and performance.

Equity theory. The foundation of this theory is based on people who desire to be treated fairly (Adams, 1963). People want to be treated on one standard scale. The theory explains how much the employees put in the job and how much they get back from the job. And is their time, effort, and commitment to the job worth what the employer in general pays back such as a good salary and other benefits. This treatment may effect their motivation to transfer training and performance positively or negatively.

Goal setting theory. As Yamnil and Mclean (2001) suggested that the goal setting theory, like the expectancy theory, may explain how and why behavior is facilitated or restrained in the pre training, training, and post training processes. This theory suggests two cognitive determinants of behavior: intention and values. Intentions are viewed as the immediate precursors of human. And the second cognitive process manifests in the choice or acceptance of intention and subsequent commitments to those goals (Lock, 1968).

What Motivates Learners to Transfer Learning and Training?

The question which is raised after finishing any program of training is what makes the trainees employ what they just learned in the classroom in the real workplace? In other words, what motivates learners to apply and connect training to the work setting? Understanding those factors will save the money and the efforts of training and might develop and improve employees' satisfaction and their productivity in the final stages.

Participants in employer-sponsored workplace learning and performance WPL range from employees to such a stakeholder (Rothwell & Sredl, 2000). Motivation to transfer is different from one level to another as they suggest. For example, the motivation of a machine's operator is different from the motivation of a supervisor. The motivation of a manager is different from the motivation of a CEO motivation, and so on.

Neo and Schmidt (1986) describe motivation as a desire to use the knowledge and skill mastered in the training program on the job. Skills and knowledge mentioned in the previous definition could be clarified as interpersonal, psychometric, and cognitive skills. According to Noe (1986), the trainees' attitudes, interest, values, and expectation can influence effectiveness of transfer. Also Egan et al, reported that motivation to transfer learning involves the drive of inspiration of an individual to shift knowledge gained from formal or informal to a new setting (Egan et al., 2004).

In terms of participation of learning activities, Baldwin, Magjuka, and Loher study (1991) found that trainees reported strong transfer intention when engaged in learning activities in which follow up from their manager was anticipated or when employees were involved in training that was mandatory. On the other hand, Kontoghiorghes (2001) suggested that environmental factors such as a motivation job, opportunities for advancement, and rewards for team work were predictors for motivation to transfer.

Motivation is significantly affected by dispositional factors. Organizations whose performance depends on their employees' willingness to learn continually and use their learning to make changes in the workplace must be concerned with the dispositional profile of those employees (Sharon and Holton, 2002). A study conducted by Kehrhahn (1995) investigated the relationship of individual and perceptions on transfer of customer service skills training found that motivation to transfer was one of the variables that predicted transfer of learning.

Another factor that affects transfer learning is perceived job and career utility. Clark, Dobbins, and Ladd (1993) conducted a study to explore the effect of several contextual factors on training motivation. The finding of the study perceived job and career utility as significant predictors of training motivation. They added that trainees were more motivated if they knew that the new training will be related to their job and will affect their performance positively and may provide them with a wider opportunity to promotion and advancement in the future.

Although some organizations force their employees to attend specific types of training, other employees attend training for various reasons such as the expectation of high results of training that is related to their jobs and affects their career. Merriam and Leahy (2005) assured that trainees with positive expectations are very likely to attempt to transfer learning from training setting to their work environment. Moreover, expectation for the training was researched by Daffron and North (2006), participants reported different reasons for wanting to be involved in the training opportunity. Generally, their motivation was high because training was related to and addressed certain expectations that the employee was planning to meet.

Clark, et al. (2003) studied the affect of decision making on training transfer. It concerns decision making and stresses that employees should be associated and involved in decisions of training. Trainees are a key factor in training plans, and involving them will result in higher levels of perceived job utility. Usually, employees who are associated or counseled in some decision consider that they share in taking this decision and will do their best in order to achieve the required outcomes of this decision.

Workplace credibility in general and credibility of the supervisor particularly is an important factor in transferring training. The supervisor is a connecting ring between the workers and the higher level of employees. The role of the organization is to explore the supervisor's credibility from the workers perspective. Supervisors need to build up a reputation for trust based on fairness and concern for those workers. Obviously, supervisors without credibility from the organization's employees will affect the organization's culture and in consequence affect transfer negatively

Since each person works for a specific goal, opportunity for advancement may be one of the most inspirational goals to achieve. Promotion and advancement in their career keeps the employees up and looking forward in two directions, horizontally and vertically. If the employee has the opportunity and the encouragement to move up and get a better position, training transfer may be one of his/her priorities; otherwise training will be meaningless and, in consequence, will not be transferred.

Training transfer is also connected to the worker's self efficacy. This concept means that some one has the confidentiality to do a sum of tasks at certain level (Bandura, 1991). Bandura considers self efficacy as one of the most important factors affecting personal activity toward goal attainment. In studying self efficacy on training outcomes, Schwoerer et., al. (2005) conducted a study to examine performance expectancy, pretraining belief, and attitudes, and found that performance expectancy was positively influenced by training experience.

Moreover, post training and feedback in the workplace is another factor that makes a difference in training transfer. Daffron and North (2006) refer to Post-Training as a tool that enhances the transfer of learning most effectively and expects the trainee to share the new information with his or her peers and/or management upon return from the class. An employee is unable to perform the job tasks in a good manner without two important factors: first: feedback from the trainer to the trainee, and, second, post-training.

In addition, Personality characteristics is significant factor in training transfer, some researchers refer to this factor as important in the transfer process. Broad and Newstrom (1992) suggested a list of trainee characteristic such as abilities and aptitudes for new skills, personality traits such as high achievement needs, and internal locus of control. Seyler et. al. (1998) suggested that individual attitudes and personality characteristic can influence a person's motivation to transfer training.

Overall, workers like to be appreciated for a job well done. Kontoghiorghes (2001) studied rewards for team work and found that this factor is a predictor for motivation to transfer. Employees who work as a team believe that they deserve to get a reward on their work. Successful corporations depend on the team working to achieve their goal. Team work supports training transfer and motivates others to participate in the training program in the future.

Motivations and Barriers of Transfer

In the training setting, the organization is responsible for preparing the climate of learning to the convenience of the trainees. A number of strategies can be employed to enhance learning transfer system: first, the organization has to ensure a supportive transfer climate, program planners may clarify with the supervisor what is to be learned and how that is transferred through follow-up assistance such as individual coaching and peer mentoring. Second, the organization should include participants in the planning. And third, the organization has to incorporate strategies that link to transfer in the program design (Merriam and Leahy, 2005, p14-16).

Time and date of program is very important and it should fit to some extent all of the trainees time and should be flexible to any changes. Also, trainers should create a friendly atmosphere in the classroom and establish a good

relation with the learners which increases the probability of training transfer. To make sure that the time of the program fits the workers' needs, the organization should conduct a need assessment of the time, schedule, and the content of training program annually or every two years. Another important issue is matching the training program with trainees needs. Employee is attending the training for different purposes such as getting a promotion, improving skills and knowledge. Program designers and planners should study the workplace environment and determine the current and the future needs of training. Training should not be occurring on accident and for a sudden need; it should be strategically planned and held on a systematic and scientific way.

In the work setting, peer support is very important to transfer. A study was conducted to determine whether the trainees' general belief about training affects the pertaining curriculum. The sample's study is 967 managers and supervisors involved in management training course. They found that trainees in this study who report encouragement and support from their peers and supervisors showed greater degree to transfer. (Facteau et al., 1995).

Barriers of transfer could be caused by three reasons: first, barriers related to anticipation in the training program. Second, factors related to the organization's climate and the third is related to training program design. Daffron and North (2006) mentioned two of three of these factors in their studies as the following:

Factors related to the participants such as time constraints, lack of the applicability of the training to the work situation, personal challenges, and issues with their group. Second, factors related to the organization's climate such as frustration in finding time to recognize their management load to include the new skills and knowledge gained in the training, and lack of expectation to share what they learned with other (p.57). The third factor which may cause barriers in transfer is program design. First of all, the program designer should pay attention to the suitability of the program to fit their interest and a program that is related to their job. If the program failed to do so, the outcomes of learning will be weak and, as a result, there will be no learning transfer.

Conclusion

Based on Holton's Model (1996), the researcher derived another model that connected learning and training transfer to training transfer theories. It is very beneficial to know that motivation occurs or is prevented because of many either external or internal factors. Internal factors include but are not limited to equity, expectancy, and goal setting theories in addition to organizational elements. External factors may include family's issues, the worker's ability, whether it is mental or physical ability, etc. In this study, the researcher focused on internal more than external factors.

Most of the studies on learning transfer refer to the participants' characteristic as an important factor. (Seyler, et la. 1998; Holton, et al. 1997) confirmed that personal characteristics play a major role in transfer. Other researchers suggested that studies should be conducted on programs that match trainees' characteristic but not to distinguish between individuals who are successful and those who are not successful in the transfer skills (Baldwin and Ford, 1988, p.90). Despite that, some studies found that there are no effects or limited effects of personality characteristic on motivation e.g. Noe and Schmitt (1986).

This literature review demonstrated the most important factors that motivate participants to transfer learning and training. The finding of this article is derived from the literature review which has been done on this topic or other related topics. In particular, motivation, the ability to transfer, and the learners' attitudes affect transfer positively or negatively. The participant is not the only factor that affects the transfer; there are other important factors that work together and affect the participant's motivations to transfer. Barriers of transfer occur because of various reasons related to the organizational climate, program design, and personality characteristics. It is recommended for future research to conduct research on participants' characteristics as a major factor in learning transfer. Researchers should look for and find those positive characteristics and strengthen them; they should also look for the undesired characteristics and develop training programs to overcome them. If we are, as stakeholders propose, to improve our final products whether these products are services or goods, we need to provide a well designed and planned learning and training for our employees and workers, we need also to learn how to motivate them to apply this learning and training in the workplace. This certainly will increase the organization's productivity and the return on investment in training.

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