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Corinne Brion  
*University of Dayton*

Allison Leigh  
*University of Dayton*

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## Marianist Educational Associates: Advancing and Promoting the Mission of Catholic and Marianist Universities



Corinne Brion, Ph.D.<sup>1</sup> and Allison Leigh, Ph.D.<sup>1</sup>

**Abstract:** Preparing employees to become stewards of Marianist values has become a priority at Marianist institutions because employees impact the institutions' environment, and faculty and staff directly impact student learning. To date, there is a lack of research conducted among employees of Marianist institutions on how new understandings of the institutional mission get transferred to their jobs. Additionally, there is a lack of empirical studies that examine what enhances and hinders the transfer of such understanding. Using the Multidimensional Model of Learning Transfer as a theoretical framework, the purpose of this qualitative study is to explore the extent to which employees attending a formation are able to transfer the newly acquired knowledge to their professional lives and to understand what inhibited and supported their transfer of knowledge. Findings reveal that participants did transfer some knowledge to their positions. Based on these findings, the research team offers recommendations to increase the transfer of new religious understanding.

**Keywords:** learning transfer, Catholic university, Marianist education, higher education

Preparing employees to become stewards of Marianist values has become a priority at Marianist institutions because employees impact the institutions' environment, and faculty and staff directly impact student learning. This study took place in a Marianist university in the Midwestern United States. The institution provides a voluntary formation for its employees called the Marianist Educational Associates (MEAs). According to the MEAs'

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<sup>1</sup> University of Dayton  <https://orcid.org/0000-0001-6151-525X>,  <https://orcid.org/0000-0002-3693-0619>

common guidelines, “Marianist Educational Associates are members of a professional community intentionally committed to strengthening, developing, and advancing the Catholic and Marianist mission and identity of Marianist Universities” (Association of Marianist Universities, 2013, p. 2). The aim of the MEA formation is to instill a deeper understanding of the Marianist charism, principles, and values. Here, the goal is that participants will advance and promote the Catholic and Marianist mission in their positions at the university. To date, there is a dearth of studies that examine the transfer of knowledge acquired during formation to religious-sponsored institutions. This qualitative study therefore explored whether and how participants were able to transfer newly acquired understanding of the Marianist tradition of higher education to their positions after attending the formation. Specifically, this study sought to identify what enhanced and inhibited the transfer of religious knowledge in order to promote and sustain the Catholic and Marianist mission.

This paper aims to contribute to the learning transfer literature and offers recommendations for organizers of religious formations. It begins by providing contextual knowledge on the formation program attended by the study participants. The second section presents a brief literature review on learning transfer, and then a description of the theoretical framework. Next, the methodology is described, followed by a presentation and then discussion of the findings. The concluding section offers recommendations for researchers and religious formation organizers.

### **Marianist Educational Associates Formation Program**

The MEA formation has taken place in two different formats over the 14 years of the program’s existence. From 2005 to 2016, the MEA formation was held over the course of five to seven days at one of the three Marianist universities: the University of Dayton, Chaminade University in Honolulu, and Saint Mary’s University in San Antonio. In 2016, the formation moved to a local model for two primary reasons. The first was an effort to reduce the cost of the program, as airfare for participants to travel to any of the universities is expensive. Secondly, by keeping the formation local, it was thought that more people would be able to participate because they would not need to take a week away from family and other commitments. At the University of Dayton, the model was a 24-hour retreat in late May or early June, followed by five two-hour formation sessions that occurred about once a month during the academic year, and a half-day closing retreat. At the end of each formation, the MEAs make a public commitment to “strengthen, sustain and develop the Catholic and Marianist mission and identity” (Association of Marianist Universities, 2013, p. 2) of their institution.

The topics covered during the MEA formation remained the same between both formats at the institution under study. Through the retreat and the sessions that followed, the topics presented were as follows: an overview of Catholic Identity and Sacramentality, Vocation, the Marianist Founders, the Marianist Charism, the Catholic Intellectual Tradition, Catholic Social Tradition

(theory and application), Marianist Higher Education, and Practicing Marianist Leadership. The formation also consisted of experiences of prayer and social conversation following each session, and there was time set aside for social conversation during the retreats. Participants in the MEA formation were selected through an application process that was reviewed by multiple university offices. Once the cohort of new associates was approved, applicants were notified of their selection and were sent the dates for the formation. This study examined what inhibited and supported the transfer of knowledge gained during the formation, to promote and sustain the Catholic and Marianist mission at the associates' university.

## Literature Review

### Learning Transfer

Learning transfer is defined as “the effective and continuing application by learners—to their performance of jobs or other individual, organizational, or community responsibilities—of knowledge and skills gained in the learning activities” (Broad, 1997, p. 2). While the literature also refers to learning transfer as “training transfer,” this paper uses “learning transfer,” as learning does not just occur in a training context and can occur months after attending a professional development or religious formation.

Learning transfer is the primary objective of teaching, yet it is the most challenging goal to reach (Foley & Kaiser, 2013; Furman & Sibthorp, 2013; Hung, 2013). Every year, billions of dollars are spent on training in the United States, and only 10% results in transfer of knowledge, skills, or behaviors in the workplace or at home (Baldwin & Ford, 1988; Broad & Newstrom, 1992). Studies from the private sector indicate that only 10–13% of learned skills are transferred, translating to a loss of 87–90 cents per dollar spent on training (Curry et al., 1994). These findings demonstrate the lack of attention placed on learning transfer and indicate that it is not sufficient simply to offer professional development events.

It has been challenging for scholars to measure learning transfer and its impact to date because all professional development, participants, and facilitators are different (Ford et al., 2011). Even so, authors have written extensively about what enhances and inhibits the transfer of learning (Caffarella, 2002; Ford, 1994; Hung, 2013; Illeris, 2009; Knowles, 1980; Taylor, 2000; Lightner et al., 2008; Thomas, 2007). Baldwin & Ford (1988) were the first to categorize enhancers and inhibitors to learning transfer and organize them into three groupings: (a) factors related to the trainees' characteristics; (b) factors pertaining to the training design and delivery; and, (c) factors affected by the work environment. The authors assert that trainees' characteristics were related to ability, personality, and motivation. In terms of training design, Baldwin & Ford (1988) documented that principles of learning, sequencing, and training content are key components to enhancing the transfer of learning. Finally, in the work environment category, the authors affirmed

that support and opportunity to use the new knowledge or skills were paramount for learning transfer to occur. These authors called for additional research on their three categories. Their call yielded additional models and factors, influencing the transfer of newly acquired knowledge.

Based on Baldwin & Ford (1988) framework, Broad & Newstrom (1992) added trainers as a fourth category, as they view the partnership between trainees, trainers, and managers as essential to fostering the transfer of learning. These authors also created a matrix in which they combined the time dimension (before, during, and after training) with the role dimension (manager, trainer, and trainee). This matrix aimed at organizing transfer strategies and assisting trainers in discerning which strategy to use at each stage of the training event.

Broad & Newstrom (1992) identified six key factors that can either hinder or promote learning transfer for adults: (a) program participants, their motivation and dispositions, and previous knowledge; (b) program design and execution, including the strategies for learning transfer; (c) program content that is adapted to the needs of the learners; (d) changes required to apply new learning; (e) organizational context, such as people, structures, and cultural milieu that can support or prevent transfer of learning values (e.g., Continuing Professional Development [CPD]); and, (f) societal and community forces. Building on Broad and Newstrom's (1992) work, the first author developed the Multidimensional Model of Learning Transfer (MMLT).

## **Theoretical Framework**

### **The Multidimensional Model of Learning Transfer (MMLT)**

Because learning is a social endeavor, culture plays a key role in the ability for adults to learn (Alfred, 2002; Caffarella & Daffron, 2013). Grounded in the influential work of the aforementioned authors and the first author's own research in several countries (Brion, 2021), the first author merged and extended existing models of learning transfer by proposing a culture-based model: the MMLT. In the MMLT, *culture* is the overarching factor that affects the other six dimensions of learning transfer. This author refers to Culture with a capital C as it includes individual, sectional, departmental, organizational, regional, and national cultures as well as cultures related to a continent. The MMLT is composed of seven dimensions: culture, pretraining, learner, facilitator, material and content, context and environment, and follow-up (Figure 1). The first author found that in some African cultures, pretraining played a key role in the learning transfer process because people in these societies preferred knowing in advance and in writing what would happen during the training, how it would be led, and by whom (Brion, 2021). With these details in mind, religious formation and professional development organizers could use the MMLT to adapt their program accordingly to enhance the learning transfer process.

Ignoring cultural issues in organizations poses numerous risks, including reinforcing stereotypes, increasing intolerance among groups, raising potential misunderstandings, escalating

frustrations and defensiveness, and withdrawing from the learners and facilitators (Caffarella, 2002; Williams & Green, 1994). As previously mentioned, the present study took place in a Marianist institution whose core values are to educate for formation in faith; in the family spirit; for service, justice and peace; and for adaptation and change. Understanding these core cultural values is key, as is understanding which factors enhance and inhibit learning transfer—this will help institutions yield a return on their investments while also enhancing the ability of religious formation to promote and sustain their mission.

Figure 1 provides a few of the elements that constitute each dimension of the MMLT. *Culture* incorporates individual, sectional, departmental, organizational, regional, and national cultures as well as cultures related to a continent. Culture also includes the differential effects of age, gender, race, ethnicity, social class, religion, sexual orientation, and abilities, as well as various other elements that constitute one's cultural and personal identity. Culture impacts learning transfer because if cultural barriers prevent people from learning, they will be unable to implement the new knowledge in their jobs (Brion, 2021).

*Pretraining* includes the orientation of supervisors so that they can support the training once it has begun. Pretraining also includes communicating expectations to trainers and participants; explaining who will benefit from training; stating that participants are responsible for implementing new knowledge (Yang et al., 2009); and sharing the schedule, goals, and important information (Baldwin et al., 1991).

The category of *learner* in the MMLT refers to the learner's motivation, understanding of their own and the facilitators' cultural background, and comprehension of how history and social events effect all stakeholders (including one's self, facilitators, peers, and colleagues). It also includes understanding cultural differences in learning styles (Mainemelis et al., 2002) as well as language and writing differences. Moreover, this category is comprised of the participants' beliefs and attitudes toward their job (Yelon et al., 2013), whether or not they have the freedom to act, and the positive consequences of that application—such as whether or not learners get rewarded in some way for implementing the new knowledge in their workplace. Finally, it involves the participants' beliefs regarding the efficacy of the knowledge and skills learned (Yelon et al., 2013).

The *facilitator* category includes the understanding of the participants' cultural backgrounds, recognizing one's own cultural background, and understanding how history and social events effect stakeholders (including one's self, students, peers, and colleagues). It also refers to the understanding of language and writing differences, setting goals, and the selection of participants (Yang et al., 2009).

*Material and content* involve using evidence-based, culturally relevant, and contextualized materials (Caffarella, 2002; Closson, 2013). This dimension also involves using a pedagogical

approach based on andragogy, or how adults learn best (Knowles, 1980; Mezirow, 2000), and using symbol and meaningful artifacts to cue and help recall (Debebe, 2011).

The *context and environment* dimension is comprised of the training environment and the work environment (micro and macro cultures within a given context), sociocultural context, transfer climate, peer contact, and the presence of social networks. It also refers to having enough time to transfer knowledge, the support for action (resources), the freedom to act, and peer support (Burke & Hutchins, 2008; Facteau et al., 1995). Finally, this category refers to the training incentives: intrinsic incentives (providing employees with growth opportunities) and extrinsic incentives (providing rewards and promotions; Facteau et al., 1995).

*Sustainable follow-up* post-training to avoid skill decay and training relapse can include tutor-facilitated networks via mobile technology (i.e., WhatsApp), micro-learning using mobile technology, coaching, testimonials, Professional Learning Communities (PLCs) or Communities of Practice (COPs), apprenticeships, coaching, and E-coaching (Brion, 2018; Wang & Wentling, 2001). Trainees' reports and transfer assessments also help create a culture where learning and its application is valued (Bates, 2003; Saks & Burke, 2012). Using the seven dimensions of the MMLT to organize, deliver, and follow-up post formation could increase the transfer of religious knowledge.

## Methodology

This qualitative study took place over eight months during the 2018–2019 academic year. The following research questions guided this investigation:

1. What learning, if any, did participants transfer to their work or personal lives after attending the formation?
2. What dimensions of the MMLT enhanced the transfer of learning?
3. What dimensions of the MMLT inhibited the transfer of learning?

## Sample and Location

The study took place at a predominantly White Marianist institution in the Midwestern United States. The convenience sample was drawn randomly from 35 university employees who had participated in the MEA program (28) and were current participants in the MEA program (7). The sample included participants who worked in marketing, the housing and residential office, the campus ministry, the international or admission offices, and human resources. Of the 35 participants, 15 were part of the week-long cohort and 20 attended the 8-month formation.

## Data Collection

The first author observed six formation sessions; she also conducted 3 individual in-depth interviews and 8 focus groups with 35 university employees having completed a formation. Four

focus groups took place in the fall of 2018 and four in the spring of 2019; they each had between three and 14 participants. Before the interviews, each participant signed a research consent form. The investigator created a semi-structured interview protocol, which included questions such as, “Can you tell me about your experience at the MEA program?” and “Tell me about challenges you faced around implementing concepts from the training.” The focus groups and interviews lasted about 60 minutes each, resulting in over 38 hours of recorded material. All focus groups were transcribed.

Focus groups were selected as a methodology to enable the lead researcher to understand the extent to which participants were able to implement and sustain new practices in their positions after attending the formation. The in-depth interviews were then conducted to allow her to go deeper into what three individuals had mentioned during the focus groups. An observational approach was taken to facilitate familiarization with the content being taught, and allowed the first author to log participation, attendance, and levels of engagement. Finally, the first author wrote analytical memos related to the methodology and kept a journal—this latter was aimed at mitigating biases and feelings that arose about the research and the participants.

### **Data Analysis**

Coding formed the base of the analysis (Saldaña, 2009). Because of the large amount of data to code, the data were pre-coded by highlighting significant quotes or passages that related to the research questions (Miles & Huberman, 1994). The data analysis took place over two cycles of coding. In round one, the first author used in vivo coding to develop codes for each key point emerging from the interviews, documents, analytical memos, and journal. In round two, using axial coding, she grouped the preliminary codes into overlapping categories to create themes. This researcher coded all transcripts and documents using qualitative analysis software ATLAS.ti. She then used the participants’ own words as themes to answer the first research question and the MMLT to categorize and interpret the data to answer the second and third questions.

### **Researchers’ Identities**

At the time of the research, the first author was a tenure-track faculty member in the Department of Educational Administration at the institution where the study was conducted. The researcher’s collaborator was the Director of Marianist Strategies, responsible for coordinating and overseeing the MEA formation program as well as the ongoing MEA formations. In this role, she collaborated with the Association of Marianist Universities and the Vice President for Mission and Rector.

### **Findings**

The first research question focused on what learning, if any, participants transferred to their positions after completing the MEA formation. Participants shared that they were inspired by



learning more about the founders of the Society of Mary. Specifically, they were inspired by the founder's dispositions and by the Marianist values. Because they were inspired, they applied these values to their positions.

### ***Confidence to Apply Knowledge Enhanced***

All participants reported that they enjoyed learning about the founders of the Society of Mary and the Daughters of Mary Immaculate, Blessed William Joseph Chaminade, Venerable Marie Thérèse de Lamourous, and Blessed Adèle de Batz de Trenquelléon. In the focus groups, participants recalled the stories that presenters shared about the founders and the struggle the founders faced to achieve their goals. Participants also appreciated learning about 18<sup>th</sup>-century France. One participant noted, "I knew about France, but I learned so much more during our formation. It helped me understand the context in which Blessed Chaminade lived and worked." Another associate added, "Learning about France and the founders deepened my understanding of the Marianist values and charisms."

All associates felt "deeply touched by what it took to build the Society of Mary." Indeed, participants affirmed that during the lectures, or the viewing of a play about the founders, they were "inspired by the founders' strength, devotion to Mary, and vision" and "were called and inspired to apply the same values in their professional and personal lives." One participant stated, "Knowing all they had to do and fight, I felt compelled and called to do my part with the Marianist values and charism. I am a better person, employee and community member because I am trying harder to enact the Marianist values." The participants emphasized that learning about the founders of the Society of Mary gave them the confidence to share the Marianist values with others and to enact them in their workplaces.

### ***Marianist Values Enacted***

Participants explained that the formation empowered them in various ways. For example, modeling themselves after the founders of the Society of Mary, they "strive to be better listeners." One associate shared, "Because of the MEA program, my daily goal is to improve my listening skills. To do that, I seek feedback, and force myself to listen without interrupting the person who is speaking. Before attending the MEA [program], I was a lousy listener, I am now getting better." One participant described this kind of patience in the following way:

Blessed Chaminade was patient, he could not rush things under the conditions in which he was living. The least I can do is to be more patient with myself, colleagues, and students. Blessed Chaminade showed me that patience is key to reach goals—if he can do it, I should try too.

Relatedly, another associate stated that "[i]t is always about the people in the end, and Blessed Chaminade taught us that." Moreover, channeling the welcoming nature of the founders, associates

shared that they go “the extra mile to be welcoming to others, new employees, students, staff, and to be more inclusive.” One associate summarized this idea when stating, “We want to model what we were taught and being welcoming and inclusive is a big part of being a Marianist institution.” Other associates agreed, with one explaining that they were “thinking broader after the formation. Not just for ourselves but we are a bigger family. We have to play our part to help raise that family.”

### ***Leadership Style Impacted***

Another area affected by the formation was the leadership style of the participants. Of the 35 associates interviewed, 20 held position of formal leadership. They all asserted that the formation changed the way they made decisions. One associate described this in the following way: “Before the formation, I would make decisions without asking the perspectives of others. This has changed drastically since the formation. I now ask my team to make certain decision—I learned to empower them and to delegate.” Another associate added, “We learned the power of teamwork and different perspectives, so I always try to empower others; it does not matter the title of the person.” A third shared that “[t]he formation changed the way I lead and want to lead. Blessed Chaminade was modest and I need to be that, too.” All participants mentioned the fact that they “now see the strengths in people rather than focusing on the flaws.”

One document shared during the formation that appeared to have influenced the learning of the majority of those interviewed was the *Characteristics of Marianist Universities* (Chaminade University of Honolulu, Saint Mary’s University, University of Dayton, 2014). This document focuses on the five principles of Marianist Education shared by all three Marianist Universities and the Marianist High Schools: providing an integral quality education; education for service; justice and peace; education in a family spirit; education for adaptation and change; and education for faith formation. One of the participants summarized the sentiment expressed by many other MEAs when she said:

Learning about the characteristics of Marianist Universities helped me to be a better person and employee. By being a better listener, being more collaborative and inclusive, I model what I want my students to be and do. It shows them that education in a family spirit is an important tenet of our institution and one that I want students to take with them and model when they serve in the community.

These findings demonstrate that participants transferred the knowledge shared during the formation by gaining confidence, being better listeners, being more patient, being more inclusive, and being welcoming. Additionally, associates altered their leadership styles and broadened their way of thinking by embodying and modeling the Marianist core values and principles in order to promote the school’s mission.

## **Learning Transfer Enhancers**

To explore which factors enhanced learning transfer, the research team used the dimensions of the MMLT to categorize the data. As noted earlier, the MMLT offers seven dimensions that can support or prevent learning transfer (see also Figure 1). The factors identified in the data that enhanced the transfer of learning were related to three of these: specifically, *culture*, *facilitator*, and *context and environment*. These are detailed below.

### ***Culture***

Participants in the MEA program talked about the culture of the MEA program as being non-judgmental. This feeling was exemplified when a participant shared, “Some of us were Catholics, protestant or not religious but no one felt judged.” This non-judgmental atmosphere created an “environment where we could be open and learn from each other, rather than judging each other and miss out on the learning as a result.” Participants attributed this “open environment” to the culture of the institution and more specifically to the MEA program. Participants all spoke about the MEA program as being a safe place in which to discuss and disagree. As a result, they learned during the MEA program, and were eager to implement their knowledge at work and in their personal lives.

### ***Facilitators***

All participants agreed that having guest speakers provided rich experiences. The associates appreciated having guest speakers like the former president of the institution because, they noted, if he took the time to come speak to the group, it meant that the information was important to hear and implement later. The associates also enjoyed having a diverse group of speakers. One group member summarized this sentiment by stating, “[the] guest speakers were all different and all brought a different theoretical or practical knowledge. It helped us seal the theory into practice.”

### ***Context and Environment***

The participants appreciated the cohort model and shared that being part of a cohort helped to create strong relationships and learn more easily. All agreed that they enjoyed the networking provided by the cohort and program, and having people from various departments, schools, and backgrounds. One associate stated, “The diversity within the cohorts allowed for more perspectives and new learning to take place.”

Participants shared that the factors promoting their transfer of learning were related to the culture of the MEA program and the various guest speakers. The cohort model also allowed for people from diverse departments and positions to attend the program and learn from each other.

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## **Learning Transfer Inhibitors**

Factors identified in the data that inhibited the transfer of learning were related to the following five dimensions of the MMLT: learners, facilitators, content and materials, context and environment, and follow-up. Each of these are explored in more detail below.

### ***Learners***

All participants felt insecure about committing to be a Marianist Educational Associate and not knowing if they were ready for the task. They repeatedly asked, “How do we know we are ready?” or “Am I prepared, and qualified?” Despite being an MEA, the associates often wondered how they were doing and if they were on track with what was expected of them. All participants shared that they did not know what their duties were, post formation. One associate wondered aloud: “What are we supposed to do? Is there a list of things we should be doing and expectations, so we know if we are on track?” These insecurities appeared to have prevented some of the associates from participating in activities or from performing their duty as an MEA. One associate noted: “Not knowing makes us complacent—we want to do and help, and we try, but we need to know what is expected of us so that we can implement what we have learned and impact others.”

### ***Facilitators***

All participants asked for more time for class discussions. While they enjoyed the guest speakers, they also wanted to have more time for in-class conversations. One associate said, “We learn by being in community, so we should have time to be in community and learn from peers.” Expanding on this idea, another participant added, “Instead of a lecture model only, it would be good to have reflection and group discussion time to allow us to process, understand, and unpack the learning.” Participants viewed the lecture model as “wasted opportunities to learn from the experiences and views of others.” Associates also requested fewer lectures and more hands-on activities.

### ***Content and Materials***

Study participants asked for a project to do during the program, so that they could implement the knowledge and concretely apply the theory they were learning. As one associate suggested, “The project could be with sister Marianist institutions, such as a high school or other universities, locally or globally.” In terms of the project and content, associates also wondered how they could be in touch with the other two Marianist universities in the United States. Moreover, they wanted “tangible takeaways included in the materials and next steps so that we can implement and fulfill our duty as MEA.” They recommended having a checklist or a document that lists the takeaways after each session and how to apply them.

### ***Context and Environment***

Participants were mostly in favor of the year-long formation model but stated that they needed the full two-day retreat to “digest the information, build trust among each other, and have time for discussions.” They also regretted that the monthly sessions were at the end of the day because many of them had family obligations and therefore had to leave on time or even early. One associate suggested other times: “The formation could happen during the work-day with supervisor approval.” Most participants also supported the idea that “sessions could be on Fridays, 1 to 5pm once a month, following the model of another university program.” Other participants wondered about the selection process to participate in the MEA program. One asked, “It seems that not everyone is invited—is it just for staff, faculty, full-time employees?” Participants wanted clarity around the selection process, to ensure that it was equitable and so that they could recommend the program to others who were eligible.

### ***Follow-Up***

All associates were concerned with the same question: “How do we continue learning? How do we refresh our knowledge?” They suggested that reflection questions and materials be sent using technology. All study participants who participated in focus groups and the one-on-one interviews were in favor of using “Isidore or Google Drive to share documents, readings, and questions” (to quote one participant). One associate even suggested having blogs for the MEA program as “a way to express what we feel, unpack, and stay in community during and after we finish the formation.”

## **Discussion**

### **Multidimensional Model of Learning Transfer**

The present study findings indicate that all participants transferred knowledge to their positions. The transfer was often more qualitative than quantitative because it centered on gaining confidence and credibility around knowledge related to the Marianist charism and values. Findings also suggest that the MMLT is an effective tool with which to evaluate formations and understand what supports or inhibits the transfer of learning. In this study, factors related to culture, facilitators, and context and environment enhanced the transfer of learning. Inhibitors to learning transfer pertained to learners, facilitators, content and materials, content and environment, and follow-up. Findings from this study demonstrate that the dimensions of the MMLT pertaining to pretraining and follow-up were not addressed as enhancers of learning transfer. This could explain the participants’ stated wish for pretraining information, including knowing the desired formation outcomes, participating in refresher classes, and taking part in follow-up activities post-training.

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### **Facilitators and Adult Learning Theory**

Participants in the MEA program requested more reflection time, group discussions, and that they be able to put the theory into practice by “doing a project.” They also asked to have “tangible outcomes” so that they could apply the new knowledge to their position. This corresponds with Knowles’ (1975) conceptualization of andragogy, based on the argument that adults’ learning needs differ from those of children (Thompson & Sheckley, 1997). The core principles of andragogy are that adults have a psychological need to be self-directed, need to base their learning on their own wealth of experiences, and are ready to learn when they can put their learning directly into action and can see a connection between their lives and what they learned in the classroom (Knowles, 1975, 1980). Moreover, study participants expressed a desire to have additional “collaborative time to discuss the content learned,” which evokes Knowles’ (1975) claim that andragogy requires teachers to become facilitators of learning, guiding the (self-directed) learning rather than managing it (Laird et al., 2003), in a collaborative process (Knowles, 1975, 1980, 1989).

Transformative learning (TL) theory is a rational process that aims to develop autonomous thinking (Mezirow, 2000). In TL, learners reflect and discuss their assumptions about the world by engaging in reflective discourse in order to change their frames of reference and consciously discover new ways of defining their worlds. Mezirow (2000) maintains that for learners to change their meaning schemes—their beliefs, attitudes, and emotional reactions—they must engage in critical reflection, which eventually leads to a transformation in perspective. In this study, participants asked to have additional time for reflection and to receive reflection prompts or questions based on their sessions and readings. Sheckley and Bell (2006) use the term “Velcro strips” to suggest that adults learn by doing, reflecting, and using their experiences as metaphorical “Velcro strips” onto which new concepts and ideas can stick. Experiences are the foundation of consciousness and they enable learners to extend their consciousness to new and diverse situations beyond their previous experiences. Based on the present study’s findings and on adult learning theories and best practices, facilitators should involve the participants in group discussions, reflection, and journaling.

### **Follow-Up Using Technology**

In this study, participants of all cohorts asked how they could keep up with the knowledge they had gained. They asked for “refresher trainings” and wondered how they could continue learning and refresh their knowledge. One way that post-training might be effectively provided is through the use of technology to keep learners motivated, encourage them, and provide follow-up. Technology can be used in a variety of ways to support the transfer of learning over time and prevent training relapse (where participants return to their former ways of doing things). Indeed, study participants suggested two platforms that could be used to share readings, questions,

documents, videos, and other materials related to the formation; they also recommended the creation of an MEA blog. This finding and the opportunity to follow up using technology is in line with Brion (2018), whose study involved using a culturally appropriate mobile application (WhatsApp) for post-training follow-up. WhatsApp is an application that allows anyone with access to a smartphone, data plan, or Wi-Fi to send individual and group messages anywhere in the world. It could therefore be used to create an MEA group and to send text messages to all associates. The text messages could be conversation triggers related to the content of the formation, or could be reflection prompts, readings, videos, or pictures. Here, WhatsApp would allow participants to continue their learning by increasing the motivation to transfer knowledge, reminding them of the content of the training, and offering encouragement.

### **Strengths and Limitations**

Trustworthiness is a key goal in qualitative research (Wolcott, 1994). Four strategies were included in the study design to enhance internal validity. First, qualitative analytic memos, journals, and triangulation helped bolster the internal validity and trustworthiness of the study's analysis. In the analytic memos, the researcher noted which patterns were emerging from the focus groups. The first author also kept a journal in which she reflected upon their feelings, biases, and the participants. Triangulation was used with several different sources of data, such as the focus groups, in-depth interviews, and observations. The lead researcher used the different data sources to corroborate the findings and reach data saturation (Patton, 2002).

Second, member checking (Mero-Jaffe, 2011) was applied, in which the lead investigator re-contacted the participants to share with them the study's findings. The participants confirmed that the findings reflected their own perspectives. Third, the investigator created a data trail (Rodgers, 2008), by copying participants' quotes from the transcript data and pasting them under each theme that emerged from the data analysis. This strategy helped ensure that sufficient transcript data supported the results being reported. It also ensured that the lead researcher was not sharing her viewpoints but rather the perspectives of the participants. Fourth, the lead researcher used low-inference descriptors (Chenail, 2012); here, participants' quotes from various transcripts were used to ensure that their perspectives were reported accurately. The rigorous study design, along with robust qualitative strategies, helped strengthen the internal validity and trustworthiness of the study's findings.

One study limitation is that this research involved only one university. Second, although the collaborator in this research was the person responsible for overseeing the formation, they were not present in the focus groups or interviews with the lead researcher. Third, all qualitative research studies are challenged with regard to external validity, since qualitative designs are context-specific by nature. However, transferability of findings is possible when conducting a series of

qualitative studies that are replicated across various settings, milieux, and time periods (Miller, 2008). Comparing the findings of additional qualitative studies would provide a pattern that could establish or fail to support a single qualitative study's external validity. As such, researchers are recommended to consider using the results from this study when designing future qualitative or quantitative studies that relate to the implementation of religious formation knowledge in universities. Despite the abovementioned limitations, the study's findings are significant, as they provide critical information to other religious institutions on how to create, lead, and follow up with professional development events related to religious knowledge.

### **Recommendations**

Based on findings from the present study, the authors offer recommendations for Catholic institutions that are seeking to improve formation programs to enhance and sustain the mission of religious institutions. First, organizers should consider using the MMLT and its checklists (sample provided in Appendix A) as a way to prepare, deliver, and follow up after formations because the MMLT provides a holistic approach to learning transfer. Because the MMLT's seven dimensions either enhance or hinder learning transfer, these areas should therefore receive attention before, during, and after a formation takes place. Facilitators can use the MMLT as a tool for self-reflection to improve their performance and facilitation. Funders can use it to determine which dimensions of the model require additional funding to provide the desired outcomes and enhance learning transfer.

Second, although potential participants attend an information session prior to the formation and a breakfast meeting once they have been selected, more could be done during the pretraining phase to reaffirm the guidelines and expectations outlined in the MEA handbook. The handbook could outline additional logistical details of the program, including the schedule, contact information, expectations before, during, and after the program, and some additional resources, such as the name of other Marianist institutions and contact information of former cohort members. The handbook could also provide additional resources, such as supplemental readings, videos, and related conferences. Providing participants with information about the training, its expectations, and their own role may reduce their fears and insecurities while increasing their ability to focus on learning and transferring their new knowledge.

Another dimension of the MMLT that deserves attention is content and materials. With regard to this dimension, participants in the MEA program asked for more time to reflect in class and out of class. They also asked for time to collaborate and learn from peers. This could be accomplished by providing time in each session for group discussions and projects. Projects could involve working in the community and/or with other Marianist institutions locally or globally. Program content could also be supported by a shadowing program. This shadowing program would allow



participants to follow an MEA alum to see how they enact and implement the knowledge in their position. This would also enhance the confidence of the newly committed associates.

A third dimension of the MMLT that might be improved in the MEA formation is sustainable follow-up. To ensure the transfer of learning, MEA organizers could ask associates to create an action plan in which they state their goals as an MEA, how they will accomplish those goals, and a timeline. Periodic and regular follow-up on these action plans is key to ensure transfer of new knowledge. Another idea would be to provide refresher courses for graduates of the MEA program. These mini courses could be online and include content such as reading and answering prompts or reflection questions. These courses would complement the occasional face-to-face meetings offered to alumni of the program. These participant-led refresher sessions could include alumni explaining how they implemented some of the program's knowledge, conducting a book study to continuously engage with content, or writing an online MEA blog. Conversation triggers could also be sent to participants via mobile technology (e.g., WhatsApp).

### **Conclusion**

The purpose of this study was to examine whether and how university employees were able to apply a deeper understanding of the Marianist mission and identity to their work. Findings show that all participants transferred knowledge to their positions. The transfer was often more qualitative than quantitative because it centered on gaining confidence and credibility around knowledge related to Marianist values and charisms. Findings also indicate that the MMLT is an effective way to promote learning transfer and understand what supports or inhibits it. In this study, factors related to culture, facilitators, and context and environment enhanced the transfer of understanding the institutional mission. Inhibiting factors pertained to learners, facilitators, content and materials, content and environment, and follow-up.

This study contributes to the literature on learning transfer by examining the transfer of formation knowledge in Catholic and Marianist institutions. At the national level, this study could shed light on the best practices to adopt when leading religious formation. Although this study examined only one program, the research team believes that its findings are applicable and adaptable to similar institutions that offer (or plan to offer) similar religious trainings. This research also identifies practical steps that can increase the rate of learning transfer and help bridge the implementation gap, where participants gain new knowledge but are unable to apply it to their educational settings. For religious knowledge to be effectively transferred and promote the mission of Catholic and Marianist institutions, organizers and facilitators could use the MMLT and its checklist as a guide to prepare, deliver, and follow-up religious formations.

### Appendix A: Sample Rubric for Practitioners

**Figure 1**  
 Multidimensional Model of Learning Transfer



Figure 2 shows one page of the pretraining rubric and provides an example of how to score the first element of the aforementioned pretraining rubric.




	SLICE	HALF	THREE QUARTERS	WHOLE
<b>Pretraining:</b> During the pretraining phase, I do the following:				
<b>Facilitator meeting:</b>				
I organize(d) a facilitator(s) meeting to review the PD materials.				
Summarize(d) an overview of the participants.				
Orient(ed) supervisors & facilitators to discuss goals, approach, and follow up.				
Communicate(d) expectations to all stakeholders; provide(d) hooks to motivate participants to attend and transfer knowledge.				
Explain(d) the benefit of PD; who is it going to benefit, culturally relevant content, and make sure the PD meets the participant's needs and organization's needs.				
Identify (ied) which employees will attend the PD?				

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*How to score the first element of the pretraining rubric:*



<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
NO MEETING WITH FACILITATOR(S) PRIOR TO PD	MEETING WITH FACILITATOR(S) BEFORE PD <b>WITHOUT</b> ENSURING THAT THE CONTENT AND MATERIALS ARE CULTURALLY RELEVANT FOR AUDIENCE	MEETING WITH FACILITATOR(S) BEFORE PD <b>SOME</b> ENSURING THAT THE CONTENT AND MATERIALS ARE CULTURALLY RELEVANT FOR AUDIENCE	MEETING TO REVIEW CONTENT TO ENSURE MATERIALS ARE CULTURALLY RELEVANT FOR AUDIENCE



## **Purpose**

The purpose of the MMLT's rubrics is to help practitioners enhance the transfer of knowledge and skills to the workplace while promoting cultural proficiency.

## **Who can use these rubrics?**

All stakeholders, formation organizers, and facilitators are encouraged to use these rubrics before, during, and after formation events.

## **How does it work?**

These rubrics are designed to help practitioners think through the following seven dimensions before, during, and after formation events: culture, pretraining, learner, facilitator, content and materials, context and environment, and follow-up. Within each of these dimensions, there are several items practitioners can check before, during, and after the formation session. One orange slice represents a 1 on a Likert scale (1 being the lowest score and 4 the highest). The half orange is a 2, the 3 quarter is a 3, and the full orange is a 4. For example, when looking at the sample pretraining rubric below, a full orange signifies that the leader organized a meeting with the facilitator(s) to review the content of the materials and ensure that the materials are culturally relevant for the audience. For the same item, a 2 may mean that the leader and facilitator(s) met but the leader did not go over the formation materials with the facilitator(s) (see example of pretraining rubric and scoring table below).

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