

Notice

For easier viewing on-screen, all blank pages in the print version of this document (i.e. page 2) have been removed from this PDF version. These pages will therefore not appear when you print the PDF file.

The pagination of the PDF version is identical to that of the print version.



FRAME OF REFERENCE

The Transfer of Learning in the Context of Literacy Training

DIRECTION DE LA FORMATION GÉNÉRALE DES ADULTES (DFGA)

DU MINISTÈRE DE L'ÉDUCATION DU QUÉBEC

AND

FEDERAL-PROVINCIAL LITERACY INITIATIVES PROGRAM

FPLIP

MARCH 1999

© Gouvernement du Québec
Ministère de l'Éducation, 1999 — 99-0208

ISBN 2 – 550 – 34527-4

Legal Deposit— Bibliothèque nationale du Québec, 1999

ACKNOWLEDGEMENTS

Participants in the experiment:

France Lainé-Madore and Andrée Lanoie, teachers with the Commission scolaire des Chênes

Hélène Brisson, teacher with the Commission scolaire des Draveurs

Monique Paquet, teacher with the Commission scolaire de Normandin

Aline Laforge, education consultant with the Commission scolaire du Lac Saint-Jean

Renée Beaulieu, teacher with the Commission scolaire de Rivière-du-Loup

Micheline Quenneville, teacher, and Louise Fleury, education consultant with the Commission scolaire de Valleyfield

René Boucher, teacher, and Johanne Seers, teacher and education consultant with the Commission scolaire Tracy

Authors

Margot Désilets, Commission des écoles catholiques de Québec

Jean Patry, Commission scolaire Jacques-Cartier

Project coordinator at the Direction de la formation générale des adultes, Ministère de l'Éducation du Québec

Michel Lauzon

Linguistic revision

Direction des services linguistiques du ministère de l'Éducation

Layout

Lise Martel, Commission scolaire Jacques-Cartier

English translation

Leslie Macdonald

TABLE OF CONTENTS

Introduction.....	1
1. Problems pertaining to transfer of learning	3
2. Transfer of learning in context of literacy training	5
2.1. <i>A Guide to Customized Literacy Training</i>	5
2.2. Success in literacy training	6
2.3. Progress assessment in context of literacy training	7
3. Definition of components of frame of reference.....	9
3.1. Definition of learning.....	9
3.2. Concept of transfer and types of transfer	10
3.3. Definition of transfer	11
3.4. Learning to be transferred	11
3.5. Types of behaviours and environments	12
3.6. Factors that foster transfer	13
3.7. Assessment of transfer	14
3.8. Places where transfer occurs.....	15
3.9. Stages involved in transfer.....	16
4. Responsibilities pertaining to transfer of learning	19
4.1. Responsibilities pertaining to characteristics of training program	20
4.2. Responsibilities of adult learners	21
4.3. Responsibilities of teachers	23
4.4. Responsibilities of training environment	25
Summary table of responsibilities of adult learners, teachers and training environments.....	28

4.5.	Responsibilities of social and family environments	29
4.6	Responsibilities of workplace	30
	Summary table of responsibilities of social and family environments and the workplace.....	34
5.	Continuing education of teaching staff	35
6.	Future developments	37
	Bibliography	38

Chapter 1
Problems pertaining
to transfer of learning

Chapter 2
Transfer of learning in context of
literacy training

Chapter 3
Definition of components
of frame of reference

Chapter 4
Responsibilities pertaining
to transfer of learning

Chapter 5
Continuing education
of teaching staff

Chapter 6
Future developments

Bibliography

INTRODUCTION

This document, entitled *Frame of Reference: the Transfer of Learning in the Context of Literacy Training*, was written following an experiment conducted in six school boards: Valleyfield, Tracy, Rivière-du-Loup, des Draveurs, Lac St-Jean and des Chênes.

Above all, the experiment made it possible to observe the factors most likely to promote the transfer of learning* and thus to develop a frame of reference for teaching staff who are working in the field of literacy within school boards.

A report on the experiment is available from the Direction de la formation générale des adultes of the ministère de l'Éducation du Québec and from the Centre de documentation en éducation des adultes et en condition féminine (CDÉACF).

- In this document, the phrase “transfer of learning” is used to mean the transfer of both skills and knowledge. Also, “teacher” has been used here because of the school board context, but “trainer” would be used in the workplace.

Chapter 1 Problems pertaining to transfer of learning
Chapter 2 Transfer of learning in context of literacy
Chapter 3 Definition of components of frame of reference
Chapter 4 Responsibilities pertaining to transfer of learning
Chapter 5 Continuing education of teaching staff
Chapter 6 Future developments
Bibliography

1. PROBLEMS PERTAINING TO TRANSFER OF LEARNING

The ultimate goal of any training is the transfer of learning. Yet the process of assessing learning transfer presents major difficulties. It is therefore necessary to create the means for assessing such transfer. Without assessment, it is virtually impossible to determine the relevance of the content taught, learning accomplished and methods used.

These issues have long been debated in the field of literacy. On May 3, 1995, they were debated in detail during a day of consultation and reflection held in Québec City and attended by representatives of the various regions of Québec.

The goal of the meeting was to identify the basic components of a common frame of reference for facilitating the transfer of learning. Documents had been submitted prior to the event for validation by the participants. The documents were then studied and improvements suggested and later implemented.

Following this meeting, it occurred to us that we should take the validation process one step further by carrying out a project that would allow us to **actually try out** the basic components of a common frame of reference in real-life contexts. The experiment was carried out and a report written.¹ The frame of reference project was also presented to participants in continuing education sessions that were held with regard to the third edition of *A Guide to Customized Literacy Training*. The suggestions and comments voiced by these participants helped enhance the final version of this frame of reference document. As the culmination of a process involving numerous people, we are now in a position to propose this frame of reference for promoting the transfer of learning in the context of literacy training.

¹ Patry, J. and M. Désilets, *Rapport d'expérimentation. Le transfert des apprentissages en alphabétisation*, MEQ, DFGA, January 1997, (in French only).

Chapter 1 Problems pertaining to transfer of learning
Chapter 2 Transfer of learning in context of literacy
Chapter 3 Definition of components of frame of reference
Chapter 4 Responsibilities pertaining to transfer of learning
Chapter 5 Continuing education of teaching staff
Chapter 6 Future developments
Bibliography

2. TRANSFER OF LEARNING IN CONTEXT OF LITERACY TRAINING

2.1 *A Guide to Customized Literacy Training*

A Guide to Customized Literacy Training presents a number of guidelines—a purpose, a goal and objectives, all of which foster the transfer of learning. Literacy training hinges on the diagnosis of needs, a diagnosis which provides an understanding of situations requiring change and in which the new skills and knowledge will be used. Utilization constitutes the final phase in the transfer of learning. In the *Guide*, the diagnosis of needs therefore constitutes a crucial step in choosing and developing the appropriate training process and is only relevant to the extent that the skills and knowledge are transferred and applied to the situation that gave rise to the needs in the first place. The diagnosis of a real need also makes it possible to spark motivation—the driving force behind learning transfer—and to ensure the adult learner’s participation in all stages of training.

Using *A Guide to Customized Literacy Training*, teachers can also promote learning transfer by teaching in a way that respects the individual learner's fundamental characteristics, for example, by ensuring that motivation is fostered and maintained and by focusing mainly on translating learning into action.

In order to facilitate the transfer of learning, *A Guide to Customized Literacy Training* further proposes training that helps learners integrate knowledge and skills—such as communication, reading, writing and arithmetic skills—into the development of functional skills related to functional themes or situations selected by the training group. Integrated training is thus the main focus of literacy training.

2.2 Success in literacy training

Studies and debates are currently underway in literacy circles with a view to coming up with a viable and measurable definition of successful literacy training. In functional literacy training, success is directly related to the completion of training by adult learners and to their application of what has been learned, in everyday life. Furthermore, current thinking regarding academic success in the context of literacy training suggests a definition that is more focused on the acquisition of communication skills and of the general skills and knowledge required to function autonomously in society, to play different roles and to increase one's personal knowledge and potential. In all cases, the adult learner's training project forms the crux of literacy training. By defining success in terms of skills, training can be geared to the adult learner's individual learning project, taking into account the fact that on completion of training, the adult will have acquired the skills needed to carry out his or her project and, consequently, will have successfully transferred what he or she has learned.

However, with respect to academic success, a specific question arises regarding learning transfer: by situating skills development in the context of literacy training, how can these skills be compared to those required to function in the broader context of society today?

Whether for the purpose of coming up with a measurable definition of academic success in the context of literacy training or of establishing a frame of reference regarding the transfer of learning, the process of defining a training project geared to the adult learner's clearly identified needs constitutes the main factor that facilitates learning transfer and ensures successful training.

2.3 Progress assessment in context of literacy training

Progress assessment is an integral part of literacy training and mainly involves assessing the quality of the learning transfer. The assessment of learning in the context of literacy training must therefore make it possible to verify whether the adult learners' expectations have been met, whether their training needs have been satisfied, and whether the progress made allows them to change situations in their everyday lives.

Progress assessment that focuses on learning transfer is similar to formative evaluation. It provides an opportunity both to encourage learners to take initiatives or risk certain actions and to highlight successful learning transfer. Motivation, which was identified during the experiment as one of the key factors facilitating transfer, can thus be sparked and maintained.

The main challenge involved in assessing learning transfer is that of observing this transfer in everyday situations. The Action Science approach², which gave rise to this frame of reference, made it possible to test three principal means of verifying learning transfer, ranging from the most valid to the least valid: direct observation through actual transfer activities carried out in or near the training centre, testimonials from people close to the adult learners who have observed the transfer, and verbal reports from the adult learners themselves. Nonetheless, the challenge of assessing learning transfer in the literacy context remains. Most of the available assessment instruments are designed to facilitate the measurement of skills pertaining to conceptual learning. The indicators that make it possible to measure the integration of this type of learning in everyday situations still involve mainly perception and observation. While recognizing that

² See Bibliography for suggested English readings on this subject.

these are perfectly justifiable indicators, we believe it is both important and necessary to develop other means and instruments that will allow us to truly measure the transfer of learning.

Chapter 1 Problems pertaining to transfer of learning
Chapter 2 Transfer of learning in context of literacy
Chapter 3 Definition of components of frame of reference
Chapter 4 Responsibilities pertaining to transfer of learning
Chapter 5 Continuing education of teaching staff
Chapter 6 Future developments
Bibliography

3. DEFINITION OF COMPONENTS OF FRAME OF REFERENCE

The experiment conducted on the transfer of learning provided us with invaluable data, which were compiled in the report on the experiment. These data brought to light some of the components of, and a common language specific to, a frame of reference. These components are outlined below.

3.1 Definition of learning

Learning can be defined as follows:

- an inferred process (intermediary variable between the stimulus and response);
- not directly observable;
- encompassing more or less lasting changes in behaviour;
- attributable to the human organism's experience or practices (and not to the learner's motivation, maturation, fatigue or surgical or chemical intervention).

Learning can be observed as differences in performance measured at different points in time (G. Malcuit et al, 1995).

3.2 Concept of transfer and types of transfer

The concept of transfer includes two different realities:

The first reality concerns the effect of one learning experience on another. The person moves on from one learning situation to another. **In this case, different types of transfer can be identified:**

Positive:	one learning experience facilitates another learning experience
Negative:	one learning experience hinders another learning experience
Specific:	the learning concerns specific skills (high degree of similarity)
General:	the learning concerns strategies that are applicable to various situations (little similarity)
Lateral:	the learning is reinvested at the same level of difficulty
Vertical:	the learning is reinvested at a higher level of difficulty
Sequential:	the prerequisites to new learning are used (progressively more difficult)
Short:	the learning is reinvested in the short term
Long:	the learning is reinvested in the medium and long term
Informed:	the subject has been given indicators regarding the similarity between the learning situation and the new situation
Spontaneous:	the subject has not been given any indicators regarding the similarity between the learning situation and the new situation.

The second reality concerns the use of what has been learned in everyday situations. The person moves on from one learning situation to an everyday situation where he or she can make use of

what has been learned. This frame of reference document focuses specifically on this type of transfer.

3.3 Definition of transfer

After the experiment and numerous subsequent discussions, we came up with the following summary definition of the transfer-of-learning process, as it applies to the literacy context:

**The use, in various everyday situations,
of declarative, procedural, and conditional knowledge
(knowledge, skills and attitudes)
acquired through training**

3.4 Learning to be transferred

There are three types of learning to be transferred: knowledge, skills and attitudes. Similarities can be established between the terminologies used to designate learning in terms of knowledge, skills and attitudes and in terms of declarative, procedural and conditional knowledge.

- **KNOWLEDGE: what**

Similarity: declarative knowledge encoded in the declarative memory.

E.g.: Knowing the rule of three.

- **SKILLS: how**
Similarity: procedural knowledge encoded in the procedural memory.
E.g.: Resolving a problem using the rule of three.
- **ATTITUDES: when and why**
Similarity: conditional knowledge encoded in the conditional memory.
E.g.: Recognizing a situation in which it is useful to apply the rule of three.

According to Tardif (1992), conditional knowledge is responsible for the transfer of learning.

3.5 Types of behaviours and environments

Distinctions can be made between two types of behaviours and two types of environments:

- **EXTERNAL BEHAVIOUR** is directly observable and involves moving around spatially.
E.g.: talking, walking, touching, etc.
- **“INTERNAL BEHAVIOUR”³** is not directly observable and does not involve moving around spatially.
E.g.: reflecting, calculating, imagining, anticipating, recollecting, talking to oneself (inner verbalizations: instructions, congratulations, reproaches, support, accusations, etc.), taking action in one’s mind, etc.
- **EXTERNAL ENVIRONMENT** includes people and their status, ideas that are circulating, events, places and things.

3 The quotation marks are used here because of the special meaning given to this expression in this document.

- **“INTERNAL ENVIRONMENT”** includes physiological (sensations) and psychological phenomena (certain internal behaviours that produce the same effects as the external environment).

3.6 **Factors that foster transfer** (behavioural and environmental factors)

During the experiment, among the many factors that can foster the transfer of learning, we concentrated on those most often mentioned by the various authors who discuss learning transfer, but also by the teaching staff who lay the groundwork for learning transfer. We therefore retained thirteen factors to which the teachers participating in the experiment paid special attention in their strategies and teaching. These factors have to do with the learner’s environment and behaviour.

Again in the context of the experiment, while all these factors contributed to the transfer of learning, they did not all do so to the same degree. The following table shows the different factors in order of importance for each category.

External environment

General

- Factor no. 1: An environment that encourages and motivates people to adopt new behaviours. (89%)
- Factor no. 2: An environment that provides opportunities for using what has been learned. (70%)
- Factor no. 3: An environment that reinforces (rewards) new behaviours. (66%)
- Factor no. 4: An environment that downplays failures without trivializing them (assessment). (39%)

Andragogical

- Factor no. 5: An environment that includes demonstrations, simulations, illustrated experiences, examples of application, incentives, and encouragement. (80%)
- Factor no. 6: An environment that resembles everyday situations where the new behaviours can be used. (77%)

Observations:

- The following components, listed in decreasing order of frequency, are the ones most often mentioned for factor no. 6: examples of application (N = 35); demonstrations (N = 32); simulations (N = 22); illustrated experiences (N = 14).
- Examples of application are most often requested in the workplace.
- The incentives/encouragement component was not included in the initial chart.

External and internal behaviour and the “internal environment”: the learner

- Factor no. 7: Learning actually accomplished. (90%)
- Factor no. 8: Motivation (identified needs, completion of a real, concrete project). (90%)
- Factor no. 9: The conviction that the new behaviours are preferable to the old ones. (84%)
- Factor no. 10: Generalization of learning (the person realizes that what he or she is learning may be useful in many situations). (66%)
- Factor no. 11: Recognition of situations in which acquired learning may be used. (61%)
- Factor no. 12: Anticipation of reinforcement (rewards for adopting new behaviours). (43%)
- Factor no. 13: The ability to adapt to the favourable and unfavourable characteristics of the environment. (41%)

3.7 Assessment of transfer

Learning transfer can be assessed in three ways:

- **Verbal reports:** The adult says that he or she has adopted a certain behaviour. The least rigorous method. Uncertain reliability.
- **Indirect observation:** Another person says that he or she has observed that the adult learner has adopted a certain behaviour. A moderately rigorous method. Average reliability.

- **Direct observation:** The teacher observes the adult learner in the process of displaying the behaviour. The most rigorous method. Total reliability.

Direct observation is essential if reliable conclusions are to be drawn.

3.8 Places where transfer occurs

Asking questions about where learning transfer takes place means asking questions about how it should be assessed. Learning transfer occurs in at least four different places:

- Everyday situations: family, friends, institutions, etc.
- Training environments
- The workplace
- The training centre [do not confuse the activities of the third mode in the functional learning process, which are designed to verify comprehension (exercises, tests, examinations, simulations, etc.), with the activities involved in the fourth mode, which are applications ventured after achieving understanding].

OBSERVATION REGARDING TRAINING CENTRES

Training centres, like people's usual environments, constitute real environments where everyday situations occur. Learning transfers can therefore be observed in these centres.

In this respect, it is vital that the training environment be set up so as to make these transfers possible and therefore both observable and "evaluable" (see "Summary Table of Responsibilities" on page 27 of this document).

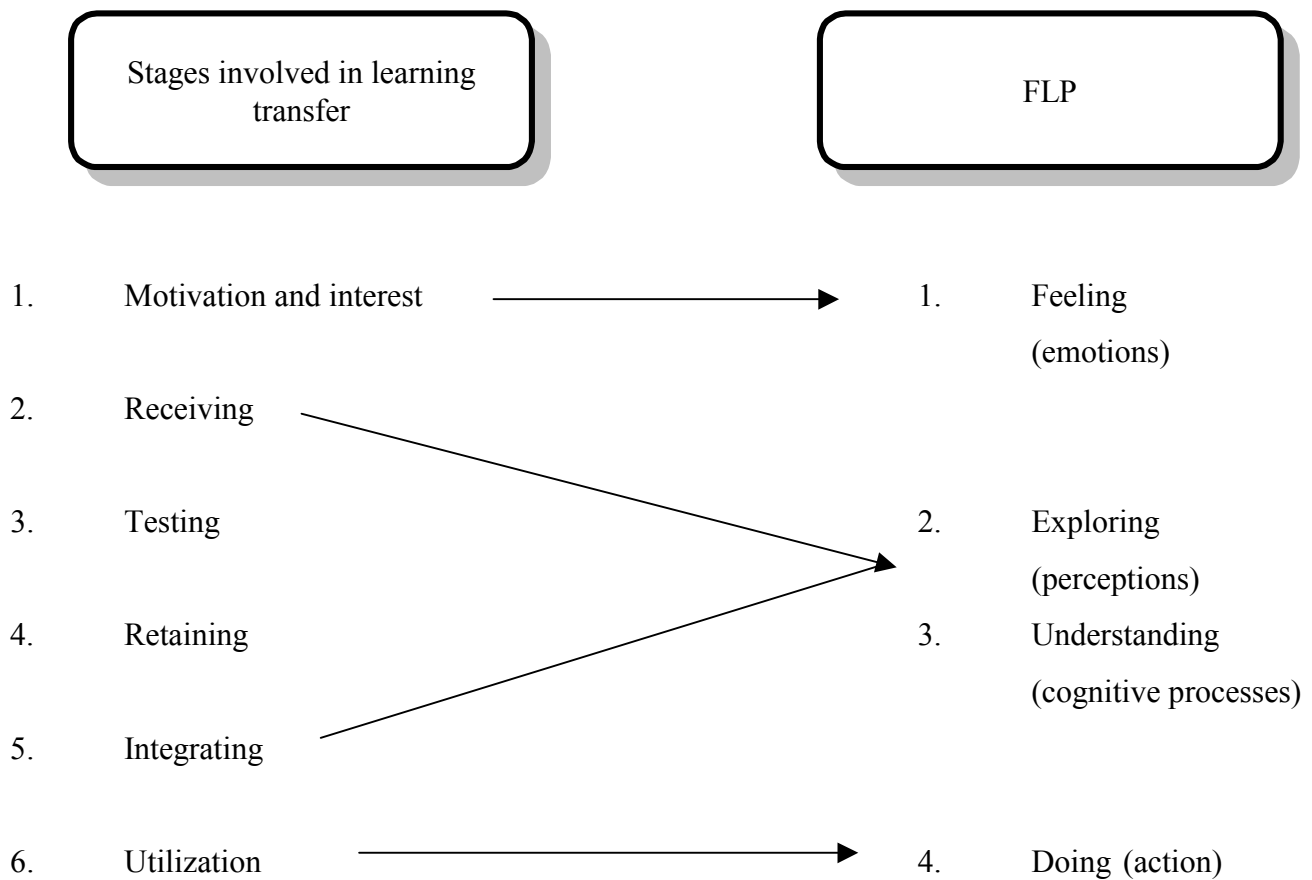
Major advantages can be derived from planning learning transfers in training centres. Direct access to activities makes it possible to:

- observe the adult learner's behaviour;
- offer support;
- offer encouragement;
- downplay situations involving only partial success or failure;
- reinforce efforts made and successes achieved;
- **ASSESS** learning transfer in other ways than solely on the basis of verbal reports from individuals.

3.9 Stages involved in transfer

Taking the customized training process (CTP) and the functional learning process (FLP) as points of reference, it can be seen that specific stages are devoted to preparing for, carrying out and assessing the transfer of learning. In the CTP, the third phase is an important one. The reinvestment of skills and knowledge occupies a central role within this phase. In the FLP, the first mode of learning makes it possible to anticipate new behaviours and the advantages that they can offer, the third mode makes it possible to identify and plan the transfer, and the fourth mode—**without which the context in which the person lives remain unchanged**—makes it possible to carry out the transfer process. The following diagram and table illustrate the relationship between the various stages involved in learning transfer and the modes involved in the functional learning process, as well as the links between the stages in learning transfer and the phases in the customized training process.

The stages involved in learning transfer compared with the functional learning process (FLP)⁴:



Jean Patry's document on the functional learning process outlines strategies for anticipating, preparing for, planning and carrying out the transfer of learning.⁵

⁴ This diagram will have to be adapted in cases where another learning process is used.

⁵ MEQ, DFGA, *Le processus d'apprentissage fonctionnel, ou le PAF en long et en large*, Jean Patry, QuÉbec, 1992.

The transfer of learning and customized training:

Note: Strategies for preparing for, ensuring and verifying the transfer of learning are found in the MEQ document on the implementation of the customized training process.⁶

Phases in the customized training process	Learning transfer (key activities)
Diagnosis of needs	<p>Identifying real needs and concrete situations to be changed... to prepare for the transfer of learning.</p> <p>Measuring acquired knowledge and specifying performance skills (in realistic and measurable terms)...to facilitate the transfer of learning.</p> <p>Eliciting the commitment of those targeted by the training...to ensure the transfer of learning.</p>
Planning the training (<i>according to the functional learning process</i>)	<p>Choosing functional situations or themes that are related to the needs identified...to prepare for the transfer of learning.</p> <p>Formulating realistic and specific objectives that are also consistent with the needs identified...to ensure the transfer of learning.</p> <p>Planning and preparing the training activities, including the conditions required for the transfer of learning.</p>
Carrying out the training activities (<i>according to the functional learning process</i>)	<p>Setting up an andragogical environment that fosters learning transfer (see 3.6, “Factors that foster transfer”).</p> <p>Using formative evaluation to reassure the adult learner and to allow him or her to verify opportunities in his or her life where skills and knowledge could be transferred.</p>
Assessment and follow-up	<p>Using assessment tools to measure what has been learned and to verify the transfer of learning.</p> <p>Implementing follow-up mechanisms, sometime after the training, in order to verify what learning transfer has taken place.</p>

⁶ MEQ, DFGA, *A Guide to Customized Literacy Training*, Margot Désilets, Jean Patry, Québec, 1997.

Chapter 1 Problems pertaining to transfer of learning
Chapter 2 Transfer of learning in context of literacy
Chapter 3 Definition of components of frame of reference
Chapter 4 Responsibilities pertaining to transfer of learning
Chapter 5 Continuing education of teaching staff
Chapter 6 Future developments
Bibliography

4. RESPONSIBILITIES PERTAINING TO TRANSFER OF LEARNING⁷

In the field of literacy, the transfer of learning is a foremost concern in the customized training and functional learning processes. Learning transfer is the ultimate goal of training. It is based on adult learners' real needs and is geared to concrete situations that need to be changed. The effective transfer of learning is the first indicator that the literacy training was successful.

⁷

The chapter on responsibilities was inspired by the following works:
 Johanne Perreault and Marie-Josée Rolland, *Modèle d'intervention favorisant le transfert des apprentissages en formation sur mesure*, Québec, May 1993.

André Revert, *Le transfert des apprentissages, textes de référence*, May 1996.

André Savoie, *Le perfectionnement des ressources humaines en organisation*, agence d'ARC, Montréal, 1987.

Table régionale de la Montérégie, *Le transfert des apprentissages*, 1993.

GRAFT, *Apprendre à se servir de ce que l'on apprend! Le transfert des apprentissages en formation*, Université de Montréal, January 1993.

The concern with learning transfer must be reflected in the entire training process. It depends on the participation of all the players involved in the process, starting with, most importantly, the direction given to the training programs, then, the adult learners themselves, the teachers, the training environment, the social and family environments, and the workplace. It is therefore important to set up all the mechanisms needed to allow for both structured and spontaneous dialogue among these different partners.

4.1 Responsibilities pertaining to characteristics of training program

A diagnosis of the adult learner's real needs represents a crucial step in developing and choosing an appropriate training process if the training is concerned with the transfer of learning. The program must therefore provide for the time and means required to make this diagnosis. The diagnosis of needs can also spark the adult learner's motivation, which is the driving force of learning transfer, and ensure the participation of the adult learner in all stages of the training. It also helps clarify the situation to be changed and in which the learning will be used. The use, or application, of learning constitutes the final stage in the transfer process.

A training program that acknowledges the fundamental aspects of adults in learning situations by proposing a process that takes into account the skills prerequisite to learning and the need for motivation to act also fosters the transfer of learning in the various situations encountered by the adult learner.

In this regard, the aims, structure, objectives and content of *A Guide to Customized Literacy Training* reflect a consistent concern with the transfer of learning. The challenge facing all those engaged in the training process is that of providing the means needed to ensure the transfer of learning.

4.2 Responsibilities of adult learners

Just as learning theories can no longer disregard the emotional and cognitive aspects of people's make-up, so too we cannot speak of learning transfer without also speaking of the responsibility to be borne by the adult learners themselves, for they are the prime architects of their own learning. Like the actual learning process, the transfer of learning is above all a unique, individual and active process that requires commitment on the part of the person undergoing training. In order to better define adult learners' responsibilities in the transfer of learning, it is important to identify certain factors that influence these responsibilities.

Influencing factors:

Biographical characteristics:

their life, health, family, educational, work and relationship history as well as their age, physical condition, level of education and social status are all factors that influence their ability to transfer what they have learned;

Psychological characteristics:

their affective and cognitive nature, self-esteem, personality structure, ability to tolerate anxiety, willpower and motivation to learn are also factors that influence their ability to transfer what they have learned;

Commitment to the transfer of learning:

regardless of their motivation, they must be committed not only to the learning process, but also to the transfer of learning. Only adult learners themselves can say with certainty what is of interest to them, what they understand and what they have retained. Therefore, both from the outset of the process and throughout, adult learners must make it their business to use what they have learned in everyday situations;

The feeling of belonging:

a person's motivation to learn also depends on a feeling of belonging to the group and the organization where the training is taking place.

Responsibilities:

Adult learners are the key individuals responsible for the quality of their participation in the transfer of learning. In the context of literacy training, this responsibility must be assumed together with the teacher:

- adult learners must first develop the skills that are prerequisite to the learning experience, particularly with regard to motivation, concentration, and the ability to generalize and apply;
- they must determine their own needs, with their teacher's help, in order to form a clearer idea of the situations in their everyday lives where transfer will take place;

- they must make sure that the anticipated situation is real and suitable and be able to envisage how the learning transfer will take place;
- they must participate in planning and carrying out their training by ensuring that the objectives pursued and the content explored are consistent with the needs they have identified;
- they must risk applying what they have learned in various life situations, throughout their training, in order to become aware of what they are capable of doing;
- they must plan the transfer by anticipating the consequences of their actions and their ability to adapt to the resulting changes;
- they must assess themselves in order to recognize their dissatisfactions and any new skills they have developed.

4.3 Responsibilities of teachers

In the context of literacy training, teachers are coaches and facilitators as well as literacy specialists. Research on the transfer of learning, carried out in the context of an Action Science approach, allowed the teachers involved to become particularly aware of the importance of their role in the transfer of learning and, in this sense, of the need to thoroughly understand all the phenomena related to this transfer.

Influencing factors:

The ability to offer high-quality training:

high-quality training in terms of applying the orientations of the training program and the andragogical approach used;

A thorough knowledge of customized training:

mastery of the entire process, particularly with regard to the diagnosis of needs;

An in-depth knowledge of the andragogical approach:

knowledge of the specific conditions under which adults learn and the ability to adapt the training program and strategies to the people targeted by the training.

Responsibilities:

- Teachers must assist adult learners in developing the skills they require to transfer what they have learned, by helping them
 - plan for transfer situations;
 - identify the challenges or obstacles that could arise, such as effort, risk, fear, and error;
 - generalize what they have learned by relating it to other situations in their daily lives;
 - assess their own progress.

- Teachers must also
 - help adult learners develop and assume their own sense of responsibility, especially by transferring what has been learned;
 - clearly spell out the objectives and develop a training plan consistent with these objectives;
 - help them define their own training needs, taking into account that they often have difficulty looking ahead and foreseeing situations where their learning could be used;
 - keep them informed of their learning progress and the objectives pursued to help empower them in their own environments;

- encourage learning transfer by promoting transfer situations in the training centre and by underscoring the newly acquired skills and knowledge;
- make sure that the situations in which the adult learners wish to apply their learning are realistic;
- help them assess their own progress and become aware of both their dissatisfactions and their new skills and knowledge;
- help them learn from their mistakes and downplay failure;
- know how to use functional situations in literacy training so as to give adult learners the skills they need to transfer their learning, and to develop the necessary teaching methods;
- know their own learning styles and help adult learners to recognize theirs;
- make sure they have the appropriate training so that they are familiar with the main factors that have an impact on learning transfer, as well as the other components of the frame of reference concerning learning transfer in the literacy context.

4.4 Responsibilities of training environment

The training environment has a major impact on adult learners, on how the training is organized and on the actual transfer of learning. It also has an impact on the staff members, particularly in terms of the support and professional development activities it offers.

Influencing factors:

Commitment to a high-quality training process:

offering high-quality services also involve: a choice on the part of the institution and requires that the training environment provide the staff and adult learners with the means necessary to ensure quality services

Adherence to the orientations of literacy training:

those in charge of the training environment as well as the various categories of people involved in literacy training, must take into account the factors that influence the adult learning process in their choice of functional situations and projects;

Adherence to the andragogical approach:

the degree of adult education expertise that the training environment has also plays a role in how the training program is adapted and offered, and helps strengthen teachers' skills. If the training environment is focused on successful adult learner training, there are greater chances that the necessary means will be implemented to effect the transfer of learning at the training location itself.

Responsibilities:

- those in charge of literacy training in the training environment must be consistent in how they present their message and organize the training activities;
- the training environment must be set up in a way that is conducive to learning transfer, by promoting initiatives or projects that allow participants to use the skills and knowledge acquired;

- those in charge of the training environment must allow adult learners to participate in decision making and to organize specific activities that help create an atmosphere which encourages risk taking and allows for mistakes;
- those in charge of the training environment must implement the means needed to ensure training follow-up and verification of learning transfer.

SUMMARY TABLE
RESPONSIBILITIES OF ADULT LEARNERS, TEACHERS AND TRAINING
ENVIRONMENTS

RESPONSIBILITIES OF ADULT LEARNERS	RESPONSIBILITIES OF TEACHERS	RESPONSIBILITIES OF TRAINING ENVIRONMENTS
<ul style="list-style-type: none"> - develop skills that are prerequisite to the learning experience; - determine their own needs; - participate in the entire training process; - risk applying what they have learned; - anticipate the consequences of the transfer; - recognize their dissatisfactions and assess their new functional skills; - influence their own living environments (insofar as possible). 	<ul style="list-style-type: none"> - help adult learners develop their sense of responsibility; - foster the skills they need to transfer learning; - specify the training objectives and content; - help them better define their own needs; - enable them to gain more control over their own living environments by ensuring good information flow; - encourage learning transfer; - make sure that the target situations for learning transfer are realistic; - help them assess their own progress; - help them downplay failure; - know how to make use of functional situations; 	<ul style="list-style-type: none"> - be consistent in how the message is presented and the training environment is organized; - provide conditions that are conducive to learning transfer (physical, organizational, human); - allow adult learners to participate in decision making and in the organization of specific activities; - implement the necessary means for ensuring follow-up and assessment of transfer.

RESPONSIBILITIES OF ADULT LEARNERS	RESPONSIBILITIES OF TEACHERS	RESPONSIBILITIES OF TRAINING ENVIRONMENTS
	<ul style="list-style-type: none"> - know their own learning styles and help adult learners identify theirs; - make sure they have the proper training regarding learning transfer. 	

4.5 Responsibilities of social and family environments

The family and social environments can foster the transfer of learning, but they can also delay or prevent it. The social environment has considerable impact on people's behaviour and, consequently, on the transfer of learning. Immigrants in particular require assistance when it comes to transferring their learning to their social and family environments.

Influencing factors:

Openness of the social and family environments to new skills and knowledge:

the adult learner's family and friends may feel threatened by the learner's new knowledge and, consequently, either ridicule or deny it;

The importance that the adult learner places on his or her social and family environments:

family and friends allow the adult learner to develop an often very strong sense of belonging. It is difficult for the adult learner to deal with negative reactions to his or her learning;

The possibilities offered by the social and family environments for developing and applying new learning:

it is easier for the adult learner to transfer his or her learning when his or her social or family environment allows for the application of newly acquired skills and knowledge, either in the family or at the workplace.

Responsibilities:

The adult learners' social and family environments must

- provide them with opportunities to use their new skills and knowledge;
- reinforce the new behaviours acquired as result of the learning that has taken place;
- encourage and motivate them to adopt new behaviours;
- downplay failures without trivializing them.

4.6 Responsibilities of workplace

The workplace is an essential partner in the transfer of learning and has specific areas of responsibility. The success of the learning transfer depends mainly on the environment, which

must encourage the application of the new behaviours learned, particularly in the workplace, where new learning should serve to improve the output and performance of each adult learner.

Influencing factors:

The company's commitment to the learning transfer process:

the company must create the conditions necessary to allow its staff to apply new learning and reinvest the resulting behaviours in organizational developments;

The attitude of the management staff:

within the company, the success of training often depends on the behaviour of management staff towards the personnel who have undergone training. Whether through silence or negative comments, management staff act as spokespeople for the organization's attitude and viewpoint;

The corporate culture:

all of the beliefs and values that an organization or a company conveys, whether in its language, history, mission, myths, standards or opinions, determine what is acceptable and what is not. As a result, they can either enhance or cancel out the effects of training. When a given workplace is characterized by values different from those underlying the new learning, the transfer may be difficult to carry out;

The atmosphere in the workplace:

the atmosphere in a given workplace reflects the perception that people have of the way they are treated and therefore of their physical and social environments. The atmosphere that prevails in the workplace may facilitate or neutralize the transfer of learning. For example, an atmosphere of fear or repression stifles the transfer of learning, whereas an atmosphere of consultation and participation fosters such a transfer.

Responsibilities:

The workplace must

- inform those who give the training of the particular corporate culture involved, of the characteristics of the people who will be undergoing training and of their real work situations;
- be open-minded in order to allow for the development of training that is truly adapted to the situations experienced by the individuals who will undergo training;
- be flexible in order to allow workers to try out their new knowledge, whether in terms of the work schedule, production calendars or tolerance for error;
- be consistent in word and action;

- help reinforce its staff by acknowledging their efforts and successes; this may mean giving them something they want, such as a wage increase, a promotion or a privilege, or relaxing certain controls;

- support their workers' newly acquired knowledge and skills by accepting the resulting changes in their behaviour. People are disenchanted when they cannot use their new knowledge and skills in the workplace, and this may even result in poorer performance and output.

SUMMARY TABLE
RESPONSIBILITIES OF SOCIAL AND FAMILY ENVIRONMENTS AND THE
WORKPLACE

RESPONSIBILITIES OF SOCIAL AND FAMILY ENVIRONMENTS	RESPONSIBILITIES OF WORKPLACE
<ul style="list-style-type: none"> - provide opportunities to use the newly acquired learning; - reinforce new behaviours; - encourage and motivate adult learners to adopt new behaviours; - downplay failures. 	<ul style="list-style-type: none"> - provide information on the corporate culture and on the characteristics of the people to be trained; - be open-minded, flexible and consistent; - help reinforce learners' achievements; - support new learning by accepting changes in workers' behaviour.

Chapter 1 Problems pertaining to transfer of learning
Chapter 2 Transfer of learning in context of literacy
Chapter 3 Definition of components of frame of reference
Chapter 4 Responsibilities pertaining to transfer of learning
Chapter 5 Continuing education of teaching staff
Chapter 6 Future developments
Bibliography

5. CONTINUING EDUCATION OF TEACHING STAFF

Teacher training on the transfer of learning is vital, as teachers are the front-line players in the process. Moreover, those who have taken such training confirm that it is absolutely necessary.

Two types of training should be provided:

- Initial training, which provides an introduction to the recommended teaching concepts and model. This training can be done individually using documentation, but is better carried out in formally organized one- or two-day group sessions.
- Continuing education, which is an extension of the initial training and consists of the carefully thought-out application of what was learned during the initial training.

Continuing education can be carried out in two ways:

- individually (through reflective practice⁸ or praxeology);
- individually or collectively (Action Science workshops).

Note: For additional information on training, consult the document entitled *Modèles de formation pour la compréhension et l'utilisation du cadre de référence sur le transfert des apprentissages en alphabétisation*⁹.

⁸ Refer to Bibliography for suggested English readings on this subject.

⁹ MEQ, DFGA. *Modèles de formation pour la compréhension et l'utilisation du cadre de référence sur le transfert des apprentissages en alphabétisation*, Jean Patry, Québec, 1998.

Chapter 1 Problems pertaining to transfer of learning
Chapter 2 Transfer of learning in context of literacy
Chapter 3 Definition of components of frame of reference
Chapter 4 Responsibilities pertaining to transfer of learning
Chapter 5 Continuing education of teaching staff
Chapter 6 Future developments
Bibliography

6. FUTURE DEVELOPMENTS

Two processes will hopefully take place in the future:

- The widest possible distribution of the relevant documents, including the report on the experiment, this frame of reference document on the transfer of learning, and the document entitled *Modèles de formation pour la compréhension et l'utilisation du cadre de référence sur le transfert des apprentissages en alphabétisation*.
- The continuation of the experiment in other regions and the pooling of the results during local, regional, national and, perhaps even Internet, forums.

BIBLIOGRAPHY

COMITÉ RÉGIONAL DE LA
MONTÉRÉGIE

L'approche fonctionnelle en alphabétisation, Cahier 1 : La démarche de formation sur mesure, partie 4 (Le transfert des apprentissages), Cahier 2 : Recueil d'activités sur la démarche de formation sur mesure, partie 7 (Le transfert des apprentissages), 1993.

FORGET, J., R. OTIS, A. LEDUC

Psychologie de l'apprentissage : Théories et pratiques.
Brossard: Behaviora, 1988.

GAGNÉ, E. D.

The Cognitive Psychology of School Learning. Boston: Little, Brown and Company, 1985.

GOUVERNEMENT DU QUÉBEC

Guide to Customized Literacy Training, 3rd edition. Québec: ministère de l'Éducation, Direction générale de l'éducation des adultes, 1996.

JEANRIE, C.

L'évaluation d'un programme de formation et des prédicteurs de transfert dans le cas d'une tâche connue, defence of a doctoral thesis in psychology, 9 December 1994.

JEANRIE, C. ET AL

Apprendre à se servir de ce que l'on apprend Le transfert des apprentissages en formation, Cahiers du département de psychologie, cahier X. Montréal: Université de Montréal, January 1993.

- MALCUIT, G., A. POMERLEAU,
P. MAURICE *Psychologie de l'apprentissage Termes et concepts*. Maloine:
Edisem, 1995.
- PAQUIN, F., J. PATRY,
M. THIFFAULT, L. TOUPIN Various articles in *Alpha Liaison*, May 1992.
- PATRY, J. *Le processus d'apprentissage fonctionnel ou le Paf en long et
en large*. Québec: ministère de l'Éducation, Direction de la
formation générale des adultes, 1993.
- PERREAULT, J.,
M.J. ROLLAND *Modèle d'intervention favorisant le transfert des
apprentissages en formation sur mesure*. Québec, May 1993.
- REVERT, A. *Le transfert des apprentissages, textes de référence*, May
1996.
- ST-ARNAUD, Y. *Connaître par l'action*. Montréal: Presses de l'Université de
Montréal, 1992. (Collection Intervenir)
- ST-ARNAUD, Y. *L'interaction professionnelle : Efficacité et coopération*.
Montréal: Presses de l'Université de Montréal, 1995.
(Collection Intervenir)
- SAVOIE, A. *Le perfectionnement des ressources humaines en organisation*.
Montréal: Agence d'ARC, 1987.
- ST-YVES, A. *Psychologie de l'apprentissage-enseignement*. Québec:
Presses de l'Université du Québec, 1982.

TARDIF, J. *Pour un enseignement stratégique L'apport de la psychologie cognitive.* Montréal: Logiques, 1992.

SUGGESTED READINGS IN ENGLISH

ARGYRIS, C.R. PUTNAM
AND D. MCLAIN SMITH, J. *Action Science.* San Francisco: Jossey-Bass, 1985.

SCHÖN, D.A. *The Reflective Practitioner.* New York: Basic Books, 1992.