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## Fostering Equitable Opportunities for All Students through Transfer of Equity Knowledge

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# **Fostering Equitable Opportunities for All Students through Transfer of Equity Knowledge**

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## **Abstract**

To date, there has been little research conducted among school leaders on how new equity knowledge gets transferred to schools. The purpose of this qualitative study is to explore the extent to which educational leaders attending a year-long equity program are able to transfer the newly acquired knowledge to their professional lives. Findings reveal that leaders were able to use new equity knowledge in their personal and professional lives. Further analysis identifies enhancers and inhibitors to the transfer of such equity knowledge. The researcher provides policy recommendations related to facilitating and sustaining the transfer of equity knowledge among school leaders.

Due to recent economic hardships and changes in the socio-political contexts of various countries, there has been an increase in human migrations. This new demographic make-over has resulted in more diversity in our communities, schools and universities. As a result of this increase in diversity, educational leadership standards call for leaders to be equitable and culturally responsive. Educating principals to be equity literate should therefore be a priority (Gorski & Pothini, 2014; Hall, Haycock & Rowan, 2010; Khalifa, 2018; Lindsey, Robins & Terrel, 2018). If educational leaders are equity literate, they will, over time, alter their teachers' and students' mindsets, reactions and actions because they play a crucial role in the education of children.

Leaders also influence teacher morale, retention, and student learning (Grissom & Harrington, 2010; Ingersoll, 2001; Marzano, Waters & McNulty, 2005; Rosenholtz & Simpson, 1990). Additionally, leaders create cultures of learning and those cultures positively affect student learning (Fullan & Hargreaves, 1991). As new generations of students benefit from a more inclusive education, they will model and formally or informally teach tolerance and respect to others.

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, Caplan, & Knuppel, 1994). Although the idea that only 10% of the money spent yields changes in practices has been disputed (Ford, Yelon, & Billington, 2011; Saks & Belcourt, 2006), these researchers agree that the money invested in developing trainees' human capital yields low to moderate results at best, indicating the lack of attention placed on learning transfer, and that it is not sufficient simply to offer training

programs.

This qualitative exploratory study examined how principals in an urban school district located in the Midwest of the United States transferred equity knowledge after attending a 10 months long pilot Equity Fellow Program (EFP). Using the Multidimensional Model of Learning Transfer (MMLT) as a conceptual framework to analyze, interpret the data, and assess the transfer of learning, this study sought to understand what inhibited and supported the transfer of new equity knowledge. Currently there is a limited number of recent research studies on the efficacy of adult learning transfer in the area of equity among educational leaders. This study intends to add to the learning transfer literature and offer recommendations for policy makers and scholars related to enhancing and sustaining the transfer of equity knowledge.

This study contributes to the literature on learning transfer by providing a new multidimensional model to assess the transfer of learning. This study is highly relevant in urban contexts where educational leaders deal with more diversity and equity issues. At the national level, this study could shed light on the best practices to adopt when leading equity training for educational leaders and teachers. This research also identifies practical steps that can increase the rate of learning transfer and helps bridge the implementation gap, in which participants gain new knowledge but are unable to apply it to their educational settings. Finally, this study offers recommendations for policy makers related to professional development.

### **Contextual Information**

The Equity Fellows Program is a school-based pilot designed to share knowledge and practical skills that promote equity using teams at 10 strategically selected schools in an urban district in the American Midwest. The teams were expected to be change agents and equity advocates in their respective schools and communities. Specifically, the Equity Fellows prompted culturally sensitive mindset changes; and fostered adoption of best practices that impact equity and

collaboration in their buildings. The 10 teams were comprised of a school principal, three teachers and a community member. Interested teachers applied by filling out an application. Each participant received a stipend of \$3,000 (assuming consistent attendance). This format was chosen so that the teachers could build additional capacity around promoting equity in their buildings. The program kicked off in July 2018 with a two-day intensive workshop led by the National Equity Project. Subsequent sessions took place at the Educational Service Center on Tuesdays from 4:30-6:30 p.m. Participants attended bi-monthly sessions from August to October and monthly sessions from November to April. A project director and three coaches led the sessions.

The coaching team created materials centered on equity standards. Examples of those standards included understanding systems of oppression, discrimination and privilege; supporting high expectations for all students; and developing the ability to work across differences to build consensus by understanding one's identity and biases. Because of the persistent and stubborn racial inequities that exist in the region, the training focused on the impact of race, racism and socio-economic status on students of color and, in particular, lack of educational opportunities and lower learning outcomes for minority students.

During each session, coaches reviewed group norms that were collaboratively created at the first session. Coaches also walked participants through the agenda and learning objectives. At the end of each session, coaches encouraged participants to provide feedback. Coaches sent participants pre-work about one week prior to each session. During the first semester, the pre-work typically included a reading, a video and/or a reflection. Additional resources also were provided. Session time was divided between discussions, lectures, a short debriefing of readings, and/or videos. In October, a panel of community change agents spoke to the group about what they were doing to combat inequities in the city.

From August to November, the training sessions focused on content related to core equity

concepts. Participants learned about and discussed racism, oppression, privilege, bias, culturally responsive teaching, redlining, and data-driven decision making for equity. Participants wrote an equity vision for their schools, participated in a data walk, and conducted a root cause analysis of equity issues in their building. The implementation phase of the training was from December to April. Participants developed an action plan based on their disaggregated data and began tackling equity issues they had identified during their data walk and the root cause analysis exercise. Pre-work and training sessions were used for participants to work in their school teams, where they identified strategies and tactics based on the metrics they had created in November.

## **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). The literature also refers to learning transfer as training transfer. In this paper, the researcher uses learning transfer, since learning does not just occur in a training context and can occur months after attending a professional development event.

Being able to transfer newly acquired knowledge is the ultimate goal of teaching (Thomas, 2007). It has been challenging for scholars to measure learning transfer and its impact to date because all trainings, trainees and trainers 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, Lightner, Benander, & Kramer, 2008, Taylor, 2000, & Thomas, 2007).

Seminal authors such as Broad and Newstrom (1992) identified six key factors that can either hinder or promote learning transfer: (a) program participants, their motivation and

dispositions and previous knowledge; (b) program design and execution including the strategies for learning transfer; (c) program content which is adapted to the needs of the learners; (d) changes required to apply new learning; (e) organizational context such as people, structure, and cultural milieu that can support or prevent transfer of learning values (Continuing Professional Development); and (f) societal, community forces. Building on Broad and Newstrom's work, this researcher proposed a Multidimensional Model of Learning Transfer (MMLT).

### **Theoretical Framework: A Multidimensional Model of Learning Transfer (MMLT)**

The researcher combined two of Broad and Newstrom's factors, namely organizational context and societal community forces into one category called context and environment. The researcher posits that the context and environment categories encompass Broad and Newstrom's ideas by including the micro and macro contexts of both organizations and societies. Based on the review of the learning transfer literature, the investigator also added two additional dimensions to learning transfer, pretraining and follow-up. Because learning is multidimensional and does not happen in a vacuum (Ford, et al., 2011), the author proposed a Multidimensional Model of Learning Transfer (MMLT) in which culture influences all other dimensions of learning transfer. This researcher used MMLT as a conceptual framework to organize and interpret the data for this study.

In this Multidimensional Model of Learning Transfer the author suggests that pretraining and post training play a key role in enhancing learning transfer and that culture is the overarching factor that affects all dimensions of learning transfer. Specifically, the author proposes that culture affects all six other dimensions of learning transfer: pretraining, learner, facilitator, material and content, context and environment and follow-up. Ignoring cultural issues in schools and organizations presents numerous risks including reinforcing stereotyping, increasing intolerance among the groups, raising potential misunderstandings, escalation of frustrations and defensiveness

as well as learners and facilitators withdrawals (Caffarella, 2002; Williams & Green, 1994).

As Figure 1 indicates, *pretraining* includes the orientation of supervisors and facilitators so that they can support the training once it is begun. Pretraining also includes communicating expectations to trainers and trainees and explaining who will benefit from training and stating that participants are accountable to implement new knowledge (Yang, Wang & Drewry, 2009), sharing the schedule, goals and information perceived as mandatory, (Baldwin & Magjuka, 1991).

*Learner* refers to the learner's levels of motivation, understanding the cultural background of the facilitators and self and comprehending how history and social events effect stakeholders (self, facilitator, peers, colleagues). The learner dimension also includes understanding cultural differences in learning styles (collectivistic vs. individualistic cultures), as well as language and writing differences. Learner is also comprised of the participants' beliefs and attitude toward their job (Yelon, 2013), whether or not they have the freedom to act as well as the positive consequences of that application. Finally, it involved the participants' belief of the efficacy of the knowledge and skills learned (Yelon, 2013).

*Facilitator* includes the understanding of the cultural background of the participants and self and how history and social events effect stakeholders (self, students, peers, colleagues). It also refers to the understanding of language and writing differences, setting goals, and the selection of participants (Yang, Wang & Drewry, 2009).

*Content and Materials* involves using evidence-based and culturally relevant and contextualized materials. This pedagogical approach is based on andragogy, how adults learn best (Knowles, 1980; Mezirow, 2000), employing symbol and meaningful artifacts to cue and help recall (Debebe, 2011).

*Context and Environment* is comprised of the training environment and the work environment (micro and macro cultures within context), socio-cultural context, transfer climate,





Figure 1. A Multidimensional Model of Learning Transfer

peer contact, and the presence of social networks. It also refers to having enough time to transfer knowledge, the support for action or resources, the freedom to act, and peer support (Facteau, Dobbins, Russell, Ladd, & Kudisch, 1995). Finally, context and environment refer to training incentives: intrinsic incentives (provides employees with growth opportunities) and extrinsic incentives (reward, promotion) (Facteau et al, 1995).

*Sustainable Follow-up* post-training to avoid skill decay and training relapse can include tutor facilitated networks via mobile technology, micro-learning using mobile technology, coaching, testimonials, Professional Learning Communities or Communities of Practice, apprenticeship, coaching, and e-coaching (Wang & Wentling, 2001). The researcher used the MMLT to identify and categorize what helped and prevented the equity fellows to transfer their newly acquired equity knowledge to their schools.

### **Methodology**

This qualitative study took place over 10 months during the academic year 2018-2019. This research utilized a case study design of the Equity Fellows Program and involved 11 school principals in order to obtain meaningful descriptions of the learning transfer phenomenon (Yin, 2014). The use of a case study design is appropriate because it allows for gathering in-depth and contextually rich data. Multiple case studies aim at increasing the transferability by providing more sophisticated descriptions and more powerful explanations (Miles & Huberman, 1994; Yin, 2014). Multiple case studies allow the researcher to look beyond initial impressions and see evidence through multiple lenses, while accounting for contextual conditions (Yin, 2014). The following research questions guided this investigation:

1. What learning, if any, did principals transfer to their schools after completing the Equity Fellows Program?
2. What dimensions of the MMLT supported the transfer of learning?

### 3. What dimensions of the MMLT inhibited the transfer of learning?

#### **Sample and Location**

The sample was 11 urban school principals participating in the Equity Fellows Program. All schools were located in the same Midwestern state and county. One principal was also a coach for the Equity Fellows Program. The sample was composed of one principal from an early learning center, three elementary-school principals, two middle-schools principals, as well as an assistant principal, and four high-school principals.

#### **Data Collection**

##### ***Interviews***

The researcher conducted two sets of in-depth individual interviews with 10 principals and one assistant principal. The first interviews took place in Fall 2018. Each principal signed a research consent form and helped the researcher complete a Basic Information Sheet. This latter included the age and educational background of leaders, and student demographics. The second interviews were conducted in May 2019 at the conclusion of the training. The investigator created a semi-structured interview protocol, which included questions such as, “Can you tell me about your experience at the Equity Fellows Program?” or “Tell me about challenges you faced to implement concepts from the training.” The interviews lasted about 60 minutes each for a total of over 22 hours of recording. All interviews were transcribed. The two in-depth interviews allowed the researcher to understand the extent to which participants were able to implement and sustain equity practices.

##### ***Observations***

The researcher observed 11 training sessions between August 2018 and April 2019, for a total of 22 hours of observation. The observations allowed the researcher to notice participants’ reactions, when learning took place and when participants were struggling. The investigator also

kept a journal and wrote field notes, and memos after each data collection day. The researcher used her journal, field notes, and memos to compare observational notes and corroborate her interpretation of the data.

### ***Site Visits***

The researcher visited all 10 schools in May 2019. The purpose of these visits was to interview the principals for the second time and to better understand the schools' context and their surrounding communities.

### ***Document Analysis***

The researcher looked at participants' school data and equity goals. She also looked at homework and asked principals to share about activities they conducted in their buildings as a result of the training. The analysis of documents helped the researcher determine whether learning transfer took place.

### ***Data Analysis***

Coding is the base of the analysis (Saldaña, 2009). Due to the large amount of data to code, data were pre-coded by highlighting significant quotes from participants or passages relating to the research questions (Miles & Huberman, 1994). The researcher coded all transcripts and documents using a qualitative software called ATLAS.ti. Analysis of qualitative data used the participant's words as themes for the first research question and the MMLT for the second and third questions.

### ***Trustworthiness***

Trustworthiness is the ultimate goal in qualitative research (Wolcott, 1994). In conducting this study, the researcher took precautions to preserve its integrity and to avoid validity threats. Because the investigator was obligated to forthrightness in relating to the participants (Wolcott, 1994), she engaged in daily reflective practices (such as journaling) throughout the process to manage her own subjectivities (Peshkin, 1988). Triangulation was also used with different sources

of data such as the in-depth interviews, site visits, observations and analysis of documents.

Triangulation provided corroboration between the data sources (Creswell, 2013; Denzin & Lincoln, 2003). The researcher also conducted member checking by asking the principals to verify the authenticity of their words and ideas.

### ***Limitations***

The sample for this research was limited and involved 11 leaders. It examined learning transfer only over the 10 months of the pilot year of the Equity Fellows Program and does not account for long-term transfer.

## **Findings**

The first research question sought to understand what learning, if any, principals transferred to their schools after completing the Equity Fellows Program. The researcher used the words of the participants verbatim as themes.

### **Learning Transfer**

#### ***“Visible Transfer”***

There were various instances of visible transfer at each school level. For example, the analysis of documents revealed that one middle-school principal changed the rubric for placing students in Algebra I “because the old one took into consideration attendance, motivation and attitude towards learning, whereas the new one is driven by data only.” The principal decided to change the rubric because she realized that the previous selection process was biased and some of the considerations had “nothing to do with math but were rather subjective.”

The same middle-school principal and colleagues from the high school in her district decided to collaborate to organize de-escalation trainings for their schools. One participant shared: “As a middle and high school, we saw the importance of not reacting right away to students' behaviors.” A high-school leader talked about creating a student group called “Voices of Concern,”

where "students have a safe place and time to voice their concerns, ideas and suggestions to make our school a better place for all."

Three additional principals talked about equity activities they conducted during their teacher-based team meetings, which were facilitated by teachers who attended the EFP. Learning transfer also occurred when two elementary school principals invited one of the EFP coaches to speak to their teachers. At five schools, teachers or principals shared with colleagues what they had learned during the training. In one instance, a school team shared their learning with their district leadership team.

In summary, participants made visible and purposeful changes at their schools during and after attending the EFP. In addition, all school leaders spoke about important mindset changes, namely having an equity lens and greater confidence and more credibility to talk about issues of equity with their teachers and staff. Although these changes were not immediately visible to someone visiting the school, they were significant in terms of learning transfer.

### ***"Equity lens"***

Principals shared having gained a new lens through which they saw themselves and their schools. Acquiring an equity lens seemed to have altered their professional and personal lives. On a professional level, principals shared that they thought differently about their students, they gained tools to tackle equity issues, and they started to look at inequities at the system level rather than in individual classrooms. One principal shared, "I ask different questions. I ask myself if what I am doing is helpful or hurting the students." Another participant said, "I now have one more tool in my tool bag to increase academic achievement because of the equity lens I gained during the training." He added, "These kinds of encounters can change people's trajectory and mind." A third principal said: "We've got to change what kids see, and it starts by us providing equitable opportunities to all." A fourth participant noted, "I now look at the school as a system, not just classrooms...and I

have a focused plan for doing that.”

On a personal level, six principals shared that they became more sensitive to issues of equity after the training. One leader said, “I am a driven and task-oriented person, so, on a personal level, the training made me think: Is it about the task or the person? I now know it is always about the person.” Two leaders said they are more aware of injustices and see “inequities everywhere.” Three different leaders said they had to debrief with others about what they learned. One said, “After the training, we go out as a team to talk and debrief and unpack personal struggles with some of the concepts.” Another principal stated, “I always share with my children and husband when I get home” and “I talked to my friends and sister about the content.”

### ***“Confidence and Credibility”***

Participants shared that the training helped them become more confident and more credible when discussing equity with others. One leader said, “Learning about laws and history made me more confident because I understood concepts I never thought about and knew how to approach.” A second principal said: “The training gave me confidence in my role as principal to address issues of equity.” A third participant said: “it helped me to demystify the topic of equity and gave me more credibility when talking about equity issues with teachers and other stakeholders.” Another leader shared, “The training gave me permission to say, 'This is exactly what we need to be doing' when it came to equity issues.” Finally, a principal said, “I have more credibility when I speak with my teachers during the post-teacher conferences and when I share materials with them on equity, such as a reading or something that I think they can benefit from.”

One principal shared that the training had affected her personally. “I was more equipped, confident and curious,” she said, “to have conversation around race with a childhood friend with whom I had not spoken in years. But I did call him and chatted about his experience to let him know I could now understand.”

## **Enhancers of Learning Transfer**

For the second research question, the researcher used MMLT to categorize and interpret data. The MMLT offers seven dimensions that can support or prevent learning transfer. These dimensions include culture, pre-training, learner, facilitator, content and materials, context and environment, as well as sustainable follow-up.

### ***Pretraining***

Six of 11 participants indicated that the training was “well-planned.” A leader shared: “It is obvious that the coaches met and prepared before the sessions.” Leaders also referred to the homework and pre-work that was required. Participants appreciated that at each session, coaches posted the calendar, objectives and agenda. “It helped us have a direction for the session and know what to expect and be focused, rather than wondering what was coming up next,” one person said.

### ***Facilitators (Coaches)***

Leaders said coaches were “kind, patient and approachable.” Others noted “they seemed to work well together as a coaching team.” One principal shared: “I liked how the coaches were always eager to help.” Three additional individuals said they appreciated the feedback the coaches gave them. “We needed help, and they sat down with us,” one individual said. A second principal shared, “We received feedback every time we worked in teams.”

### ***Content/ Materials***

In terms of materials and content, leaders talked about the pedagogy used during the training. They enjoyed the group work and having time to work with their teams. One leader said, “We are busy at school, so having the time to work at the training was beneficial for us.” Two leaders said the reflections were important “because we rarely take the time to stop and reflect.” Other participants spoke about the value of the resources, including the readings, visual aids and guest speakers. All leaders spoke highly about the readings that “were short and practical.” Four



persons said they appreciated materials that directly related to the district area: “It makes it (equity) real for us and helps me identify with the work.” Specifically, these leaders were grateful for information regarding redlining in the region. One person shared, “I liked the redlining because I am from here but did not know; it explained a lot of what is going on today in our schools.”

Three participants said the trainers' visual aids were “effective.” Three participants said an illustration explaining equality versus equity “helped me understand that difference.” Eight of the 11 leaders said that the panel of community change agents was “the most powerful session” because it was “practical and real and here at home.” “It motivated me — seeing them fighting for equity,” the participant said..

### ***Context/ Environment***

The last dimension of the MMLT that enhanced the transfer of learning was context and environment. All participants appreciated the snacks and refreshments. “We have long days, and sometimes we had other duties after the training, so eating a bit helped us stay awake and learn,” the individual said. Participants loved the raffles. “It lightens our moods, and we are like kids in this way,” the person said.

### **Inhibitors of Learning Transfer**

The third research question related to dimensions of MMLT that inhibited the transfer of learning. These factors were related to culture, pre-training, learners, facilitators, content and materials, and follow-up.

### ***Culture***

Leaders said that focusing on equity requires changing the culture in their buildings. One person said, “Implementing concepts from the training is going to mean a culture shift in all areas: in language, in focus, in communication and accountability. For example, I will need to conduct my walkthroughs differently.” To change the culture in their schools, school leaders needed time to

build trust with their team members.

All school leaders agreed that during the training, they did not spend enough time on how to build relational trust. One person said, “I did not share because of trust issues in the group. I did not know everyone...and did not know if White people could understand my experience. “Another principal stated, “I think we needed to build trust among each other first and among coaches. It all came fast. I know it (the training) is grant-funded, but how can we do the work without having trust first in the large group and within our teams?” Another leader said that he “was shut down by the group and did not feel safe to share after that.”

### ***Pretraining***

Six of the 11 leaders said that there was a lack of effective communication during the pretraining phase. They referenced the process for choosing team members from their schools. Four leaders shared that they "had the wrong team" and wished other individuals had been selected to do the work. One leader said, “I was not clear on the expectations and desired outcomes of the program, so I selected people who needed the work on equity, not people who could build the capacity of others.” A second leader shared that “our team is the wrong team because they are not respected, and the teachers will not listen to them.”

### ***Learners***

The fact that not all participants had the respect of peers in their buildings seemed to have prevented learning transfer. As previously mentioned, four leaders did not feel that they had the “right teachers” on their teams. “The teachers were not motivated enough and respected enough to inspire others when it came to the sharing phase,” he said. One leader said, "The teachers (who were) not part of the training fought me when we wanted to share with them what the team had learned. They called the union on me because I asked them to stay a few minutes after school. I do not think that would have happened if the team we chose to attend the training was respected and

motivated.

### ***Facilitators (coaches)***

While all principals commented positively on the coaches' skills and attitudes, they suggested three areas for improvement. Five leaders said that the training appeared more disjointed after the winter break. Eight principals said there was a lack of clarity when it came to write their equity goals based on data and finding strategies and tactics to achieve their goals. One leader said, “There was a lot of confusion around the activity.”

All principals said they needed more time to transfer what they had learned, and they believed that the implementation phase should have occurred during the second year. One principal said, “We needed more time to implement, and, for some of us, we realized that we did not have trust among our teams; so we had to take a huge step back and work on that after the coaches brought up relational trust in February.”

Finally, although principals realized that their team was supposed to train others regarding equity concepts, eight indicated that they were unsure on how to do that. These principals asked for “a toolkit on how to do that in our buildings” and suggested reserving time during the training to “tell us, model and guide us on what we can do in our building, almost like lesson plans.” Overall principals appreciated their coaches and the work they had done in this pilot year.

### ***Content/ Materials***

Leaders suggested that there were challenges with the content of the training, the pedagogy and timeline. Three leaders thought that the initial content was intimidating; they wished that the “facilitators used language that was more accessible.” One person said, “I felt dumb because I did not know the difference between equity and equality; I just wanted basic terms explained to me in a simple manner.” A third leader said, “The content was higher than the level of the group.”

However, four leaders said that the content was not new to them: “One size does not fit all; we all

have different schools and communities and levels of understanding.”

Another leader added, “Some people need to learn about white privilege, while others need to learn about privilege among other races.” One individual said, “I live the content; it is not new for me.” Two principals suggested that, in the future, content should be differentiated. “For that, a needs assessment of the participants’ levels and understanding is needed,” he said.” Regarding pedagogy, three leaders said that they wanted the content to be “authentic.” One leader said that focusing on the region was useful. “I liked it when it (the content) was about the city,” he said. “The redlining article made it more real for me.” Another leader asked for “more problems of practice,” while a third posited that he needed “more practical examples.” “If we talk about bias,” he said, “what do we practically do in school?”

All participants said they needed more time to talk in groups for the purpose of learning from each other. Five leaders suggested not working exclusively with their school teams. They wanted to learn from other people in the group. Six leaders suggested debriefing the homework, reflections and readings “because we took the time to read and do it, and we want to hear other interpretations, perspectives; we want to have time to talk about it.” In her observational notes, the researcher wrote the following on this topic: “I hear lots of teams saying that they need more time to talk in teams, with peers and to debrief activities.”

The consensus from leaders was that the first year “should have been about learning and laying the foundation.” One leader said, “The first year should have been focused on content and more time on concept, such as biases and relational trust.” Another principal said, “We felt rushed with the content this year.”

Four principals said that they wished the content had included materials relating to the LGBTQ community, religion and gender because “our schools are more diverse, and we do not just have race problems anymore.” Another participant said, “Equity is all eight: not just race. At least

we need to brush up on sexual orientation, abilities, gender, religion, and socio- economic status because our students are changing, and we need to learn to adapt to them.”

### ***Sustainable Follow-up***

Follow-up is an essential component of learning transfer because it prevents what Ford and Weissbein (1997) call post-training relapse. Nine principals said coaches needed to visit their schools, so that they "understand our culture and context.” Another leader said, “If coaches came to our schools, they could then see what we already know and differentiate their instruction and their expectations.” Three leaders also wanted to have more regular feedback between sessions; they specifically asked for “feedback early on in the metrics and data walk processes.”

These same principals suggested that each group should have an assigned coach and that coaches should agree on expectations and feedback. “At times, it was confusing because one time we would have one coach and the next time someone else," one person said. "They were not consistent among themselves with their comments.” Three other principals agreed that although the pre-work was helpful and sufficient, they needed “nudging, reminders of content between sessions, and some of us might have wanted more materials but not all at once, so we are constantly thinking of equity.” Finally, three participants mentioned that the Google drive was not accessible at the beginning, so they could not use the PowerPoint presentations to review or refresh their memories.

## **Discussion**

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

Based on the research findings, the culture dimension of the MMLT could be better defined. Participants shared that the culture of their organizations affected their ability to transfer equity knowledge. As a result, the culture dimension of the MMLT ought to be explained in greater details. Such explanation could include that culture as a category includes the national (country), regional (state or/and county), organizational (elementary school, middle, rural, urban), and

departmental cultures (teacher-based meetings for example). Overall, the MMLT offers a comprehensive and holistic approach to assessing the transfer of equity knowledge. Practitioners, policy makers and scholars, in any field of study, could use the model to assess and examine quantitatively or qualitatively the transfer of learning. The MMLT can be used by program organizers, trainers, funders, and participants. Organizers can use it to prepare quality programs by using each dimension to check that they have done all they could to promote learning transfer during and after training. Trainers can use it as a tool for self-reflection as to improve their performance and training. Funders can use it to determine which dimensions of the model requires additional funding to provide the desired outcomes and enhance the transfer of learning. Participants can use the MMLT as a feedback tool for organizers, trainers and funders. A survey using the dimensions of the MMLT could be designed to collect valuable data and feedback from all stakeholders. The MMLT offers a multidimensional approach to learning transfer that can help stakeholders assess the transfer of learning during and after a professional development event. According to Ford et al. (2011), there is a need for a holistic model because Broad and Newstrom's assertion that only 10% of the monies invested in training results in learning transfer is challenging to verify and measure.

### **Gaining Equity Knowledge**

The increase in diversity in urban districts in particular has caused American practitioners and policy makers to focus much of the resources and educational initiatives on closing the achievement gap between White and African American students and students from lower economic status (Hall, Haycock & Rowan, 2010). However, without ensuring that educational leaders gain an equity lens, initiatives will most likely not yield the desired outcomes. Leaders need to become equity literate and understand concepts of relational trust, racism and White privilege. As a result, it is imperative that our school leaders and teachers be trained on issues related to equity, so they

become advocates for these underperforming students. It is crucial that educational leaders understand how to work with diverse environments and know how to build the equity capacity of their teachers and community members for sustainable progress (Gorski & Pothini, 2014). Training on equity and diversity can be part of the prospective educational leaders' courses at the university or trainings can be offered by the district itself. Regardless of where and when the training takes place, educational leaders need to be able to apply to their schools the newly acquired equity knowledge.

### **Transferring Equity Knowledge**

To educate and serve all students equitably, educators need to be held accountable to apply newly acquired knowledge. Principals could set equity goals for themselves, which could become part of their yearly evaluation process. At the teacher and staff level, the same could be done.

Because becoming equity literate often means altering mindsets, it can provoke high levels of discomfort. As a result, people tend to avoid the work it takes to be well-informed in matters of equity. To prevent work avoidances, it is important to understand how adults learn best so as to promote learning transfer (Knowles, 1980, Mezirow, 2000). Student-centered strategies help students implement new knowledge. Case studies, reflection, and simulations are tools that adults enjoy using when learning new content because they allow them to relate the theory to their context. Making transfer plans, is another strategy that supports the transfer of new knowledge over time. Those action plans remind trainees of their goals and intentions and help with accountability. Additionally, to avoid transfer decay, whereby the new knowledge does not get applied (Ford, Baldwin, & Prasad, 2018), the use of transfer coaches or transfer supervisors is recommended. These coaches follow up with trainees, provide guidance, with regular quality feedback to support the trainees with the implementation of their transfer plans.

Finally, mobile technology platforms could be used to send micro-content to learners

between sessions. Researchers have explored the role of mobile technology in enhancing learning transfer and found that WhatsApp has had favorable results (Brion, 2018, Swaffield, Jull, & Ampah-Mensah, 2013). WhatsApp is a free application that allows users to send text messages, share documents or pictures, and make phone calls. Because WhatsApp uses WiFi, it is free. Follow-up post-training sessions and refresher courses could also be conducted using Skype, Zoom or WhatsApp.

In order to increase learning outcomes for all students and adapt to the current needs of our diverse students, it is urgent that all educational leaders and teachers receive equity training. It is also essential that resources invested in training and professional development activities need to yield higher levels of implementation in schools. To get a return on educational investments, it is important that stakeholders take into consideration learning transfer. The MMLT is a tool that can help stakeholders in all phases of trainings. The MMLT can serve as a framework for preparing, reflecting, assessing, and receiving feedback on the training.

### **Equity Policies**

Being able to lead in diverse communities is an indispensable skill for current urban school leaders. Urban leaders should be or become equity literate in order to meet the diverse needs of their students. Regardless of the leadership standards a state chooses to adopt, they all call for leaders to be equitable and culturally responsive. Despite these standards, many educational leaders remain equity illiterate (Gorski & Pothini, 2014; Khalifa, 2018; Lindsey, Robins & Terrel, 2018). As a result, districts and states should outline professional development policies and accountability systems on matters of equity.

### **Recommendations**

The researcher offers two recommendations for scholars and policy makers. These recommendations are based on a limited sample of 11 educational leaders in one Midwestern state



of the United States.

### **Recommendations for Scholars**

Additional research using the MMLT would allow investigators to substantiate the model. Future research may use the MMLT to assess learning transfer in diverse urban contexts. Currently there are limited studies that examine the learning transfer phenomenon overtime. The average time for transfer studies is 14 months (Ford et al, 2018). Further longitudinal research should investigate how equity knowledge among urban school leaders gets transferred and sustained.

### **Recommendations for Policy Makers**

From this study, several implications for education policy can be discerned in order to improve schools. First districts and states should provide resources to train all educational leaders and teachers on concepts related to equity. Second, districts and states should use the MMLT to prepare, assess and receive feedback on the trainings they offer. The MMLT can also provide valuable information and data that directly impacts planning and budgeting for additional professional development activities. For example, if using the sustainable follow-up dimension of the MMLT, educators find that they did not provide enough follow-up, or the wrong kind of follow-up, they can offer additional support for that dimension in particular. Third, trainers should use student centered activities such as case studies, simulations, and reflection. Trainers may also need to be trained on how to be effective facilitators of learning. Trainers should be familiar with the MMLT during all phases of the training to foster greater transfer of learning. Finally, trainers and organizers should pay close attention to the last dimension of the MMLT pertaining to sustainable follow-up. Often times, the lack of follow-up hinders the transfer of learning. Technology, transfer plans and transfer coaches are effective ways of following up post training.

### **Conclusions**

The purpose of this study was, first, to examine if and how urban principals were able to

transfer new equity knowledge to their schools. Findings revealed that all principals transferred important knowledge to their schools. However, the degree of transfer varied by district, school and principal. While some elements of the training were transferred and visible in some schools, the transfer often was more qualitative than quantitative because it had to do with mindset changes and gaining confidence and credibility on knowledge related to equity. Findings also indicated that the MMLT is an effective way to assess learning transfer and understand what supports or inhibits it. In this study, factors related to pre-training, facilitators (in this case coaches), content and materials, as well as the context and environment enhanced the transfer of equity knowledge. Inhibitors were connected to culture, pre-training, learners, facilitators, materials and content, as well as follow-up.

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