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

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Marianist Educational Associates: Advancing and promoting the mission of Catholic and Marianist Universities

Abstract

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

Keywords: Learning transfer, Catholic University, Marianist Education, Higher education

Introduction

This study takes place in a Marianist university in the Midwest of the United States. The institution provides a voluntary, eight month-long formation to its employees called the Marianist Educational Associates (MEA). According to the Marianist Educational Associates common guidelines, “Marianist Educational Associates are members of a professional community intentionally committed to strengthening, developing, and advancing the Catholic and Marianist mission and identity of Marianist Universities” (Association of Marianist Universities, 2013). The aim of the MEA formation is to form the participants in a deeper understanding of the Marianist charism, principles, and values. The hope of the program is for participants to advance and promote the Catholic and Marianist mission in their positions at the university. To date, there is a dearth of studies in religious sponsored institution that examine the transfer of knowledge acquired during formation. This qualitative study explored how, if at all, participants were able to transfer newly acquired understanding of the Marianist tradition of higher education to their positions after attending the formation. Specifically, this study sought to comprehend what inhibited and supported the transfer of religious knowledge in order to promote and sustain the Catholic and Marianist mission.

This study intends to add to the learning transfer literature and offer recommendations and a checklist for organizers of religious formations that are meant to improve and sustain the mission of Catholic and Marianist institutions. While this empirical study is focused on one initiative, the authors believe that understanding what promotes and hinders the transfer of new insights and understanding of institutional missions could be valuable to similar institutions that offer or plan to offer similar religious formations. This paper begins with a contextual knowledge on the formation program the school participants attended. The second section presents a brief

literature review on learning transfer followed by the description of the theoretical framework while the third part details the methodology followed by the findings and a discussion. The concluding section offers recommendations for researchers and religious formation organizers.

Marianist Educational Associate Formation

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

The topics covered during MEA formation remained the same between both formats. Through the retreat and the sessions that followed, the topics presented were as follows: an overview of Catholic identity and sacramentality, Vocation, the Marianist Founders, the Marianist Charism, the Catholic Intellectual Tradition, Catholic Social Tradition both in theory and application, Marianist Higher Education, and Practicing Marianist Leadership. Formation

also consisted of experiences of prayer and social conversation following each session. There was also time set aside for social conversation during the retreats. Participants for MEA formation are selected through an application process that is reviewed by multiple university offices. Once the cohort is approved, applicants are notified of their selection and are sent the dates for the formation. This study examined what inhibited and supported the transfer of formation knowledge in order to promote and sustain the Catholic and Marianist mission.

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, as learning does not just occur in a training context and can occur months after attending a professional development or religious formation.

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

It has been challenging for scholars to measure learning transfer and its impact to date because all professional development, participants, and facilitators are different (Ford, Yelon, &

Billington, 2011). Even so, authors have written extensively in seminal studies 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).

Baldwin and Ford (1988) were the first to categorize enhancers and inhibitors to learning transfer and organize them into three groupings: (1) the factors related to the trainees' characteristics; (2) the factors pertaining to the training design and delivery; and (3) the factors affected by the work environment. In their seminal work, the authors assert that trainees' characteristics were related to ability, personality, and motivation. In terms of training design, Baldwin and Ford (1988) documented that principles of learning, sequencing, and training content are key components to enhancing the transfer of learning. Finally, in the work environment category, the authors affirmed that support and opportunity to use the new knowledge or skills were paramount for learning transfer to occur. The authors' called for additional research on their three categories. Their call yielded additional models and factors influencing the transfer of newly acquired knowledge.

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

Broad and Newstrom (1992) identified six key factors that can either hinder or promote learning transfer for adults: (a) program participants, their motivation and dispositions, and previous knowledge; (b) program design and execution including the strategies for learning

transfer; (c) program content 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 [CPD]); and (f) societal and community forces. Building on Broad & Newstrom's (1992) work, the researcher proposed a Multidimensional Model of Learning Transfer (MMLT).

Theoretical Framework

A Multidimensional Model of Learning Transfer (MMLT). Because learning is a social endeavor, culture plays a key role in the ability for adults to learn. Grounded in the influential work of the aforementioned authors and her own research in several countries (Author, in press), the researcher merged and extended existing models of learning transfer by proposing a culture-based model: The Multidimensional Model of Learning Transfer (MMLT). In MMLT, the researcher suggested that culture is the overarching factor that affects all dimensions of learning transfer. Specifically, the researcher proposed that culture affect all six other dimensions of learning transfer: Pre-training, Learner, Facilitator, Material and Content, Context and Environment, and Follow-Up. In her research abroad, the researcher found that in some African cultures, pretraining played a key role in the learning transfer process because people in these societies preferred knowing in advance and in writing what would happen during the training, how it would be led, and by whom. With these details in mind, religious formation and professional development organizers could adapt accordingly to enhance the learning transfer process.

Ignoring cultural issues in organizations present numerous risks including reinforcing stereotypes, increasing intolerance among the groups, raising potential misunderstandings, escalation of frustrations and defensiveness, and withdrawals from the learners and facilitators

(Caffarella, 2002; Williams & Green, 1994). As previously mentioned, the present study took place in a Marianist institution whose core values are to educate for formation in faith, educate in the family spirit, educate for service, justice and peace, and educate for adaptation and change. Not understanding these core cultural values would make it challenging for someone who did not embrace collaboration because serving others is a fundamental part of the Marianist culture. Understanding what factors enhance and inhibit learning transfer will help institutions yield a return on their investments while also enhance the ability of religious formation to promote and sustain mission.

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

Learner refers to the learner motivation, understanding the cultural background of the facilitators and self, and comprehending how history and social events effect stakeholders (including self, facilitator, peers, and colleagues). The learner category also includes understanding cultural differences in learning styles (Mainemelis, Boyatzis, & Kolb, 2002) as well as language and writing differences. Learner is also comprised of the participants' beliefs and attitudes toward their job (Yelon, Ford, & Golden, 2013), whether or not they have the freedom to act, and the positive consequences of that application. Finally, it involves the participants' belief of the efficacy of the knowledge and skills learned (Yelon et al., 2013).

Facilitator includes the understanding of the participants' cultural backgrounds,

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

Material and Content involves using evidence based, culturally relevant, and contextualized materials (Caffarella, 2002; Closson, 2013). It also involves using a pedagogical approach based on andragogy, or how adults learn best (Knowles, 1980; Mezirow, 2000), and it involves using 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, peer contact, and the presence of social networks. It also refers to having enough time to transfer knowledge, the support for action (resources), the freedom to act, and peer support (Burke & Hutchins, 2008; Facticeau, Dobbins, Russell, Ladd, & Kudisch, 1995). Finally, Context and Environment refers to the training incentives: intrinsic incentives (provides employees with growth opportunities) and extrinsic incentives (rewards and promotions) (Facticeau et al., 1995).

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

Methodology

This qualitative study took place over eight-months during the 2018-2019 academic year.

The following research questions guided this investigation:

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

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

Data Collection. The researcher conducted eight focus groups with 35 university employees and three individual in-depth interviews. Additionally, the researcher observed six formation sessions. Four focus groups took place in the Fall of 2018 and four in the Spring of 2019. Focus groups had between three and 14 participants. Prior to starting the interview process, each participant signed a research consent form. The investigator created a semi-structured interview protocol, which included questions such as, “Can you tell me about your experience at the MEA Program?” or “Tell me about challenges you faced to implement concepts from the training.” The focus groups and interviews lasted about 60 minutes each for a total of over 38 hours of recording. All focus groups were transcribed. The multiple focus groups

allowed the researcher to understand the extent to which participants were able to implement and sustain new practices in their positions after attending the formation. The in-depth interviews allowed the researcher to go deeper in what three individuals had mentioned during the focus groups. The observations allowed the researcher to be familiar with the content taught and allowed her to log participation, attendance, and levels of engagement. Finally, the researcher wrote analytical memos related to the methodology and kept a journal. The journal aimed to help mitigate biases and feelings that arose about the research and the participants.

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

Researchers' Identities. At the time of the research, the principal investigator was a tenure-line faculty in the Educational Administration department at the institution where the research was conducted. The researcher's collaborator was the Director of Marianist Strategies. Part of the role of the Director of Marianist Strategies is to coordinate and oversee the MEA formation program as well as the ongoing formation of MEAs. She does this in collaboration with the Association of Marianist Universities and the Vice President for Mission and Rector.

Trustworthiness and Validity. Trustworthiness is the ultimate goal in qualitative research (Wolcott, 1994). To enhance the study's internal validity, the researcher built four particular strategies in the study design. First, qualitative analytic memos, journals, and triangulation helped to bolster the internal validity and trustworthiness of the study's analysis. The researcher wrote analytic memos in which she noted what patterns were emerging from the focus groups. The researcher also each kept a journal in which she reflected upon their feelings, biases, and the participants. Triangulation was used with several different sources of data, such as the numerous focus groups, in-depth interviews, and observations. The researcher used the different sources of data in order to corroborate the findings and reach data saturation (Patton, 2002). In addition, the researcher's analytic memos enabled her to write down notes on the study's methodology.

Second, this researcher applied member checking (Mero-Jaffe, 2011). To achieve member checking, the investigators re-contacted the participants to share with them the results section of the study. The participants confirmed that the findings reflected their own perspectives. Third, the investigator created a data trail (Rodgers, 2008). This is a qualitative research practice where the researcher copied the participants' quotes from this study's transcripts data and pasted them under each theme that emerged from the data analysis. This strategy helped ensure that sufficient transcript data supported the results reported in the present study. Following this process also ensured that the researcher was not sharing her viewpoints but was rather sharing the perspectives of the participants. Fourth, the investigator used low-inference descriptors (Chenail, 2012). In this qualitative protocol, the researcher used participants' quotes from various transcripts to ensure that their perspectives were reported accurately. The researcher believed that she employed a rigorous study design along with robust

qualitative strategies to ensure the internal validity and trustworthiness of the study's findings.

Limitations. First, this research involved one university. Second, the collaborator in this research was the Director of Marianist Strategies, the person in charge of overseeing the formation. The Director of Marianist Strategies was not present in the focus groups or interviews with the researcher, however. Third, all qualitative research studies are challenged with external validity, since qualitative designs are context specific by nature. However, transferability of findings is possible when conducting a series of qualitative studies that are replicated across various settings, milieu, and time periods (Miller, 2008). Comparing the findings of additional qualitative studies would provide a pattern that would establish or fail to support a single qualitative study's external validity. Researchers should consider using the results from the present study when designing future qualitative or quantitative studies that relate to the implementation of religious formation knowledge in universities. Despite these limitations, this research is significant as it provides critical information to other religious institutions on how to create, lead, and follow up professional development events related to religious knowledge.

Findings

The first research question sought to understand what learning, if any, participants transferred to their positions after completing the MEA Program. The researcher used the participants' words verbatim as themes.

“We Were Inspired to Apply Knowledge.” As this quote reveals, participants shared that they were inspired learning more about the founders of the Society of Mary. Specifically, they were inspired by the founder's dispositions and by the Marianist charisms. Because they were inspired, they applied these values to their positions.

Learning about the Founders Gave Confidence to the Learners to Apply Knowledge.

All participants enjoyed learning about the founders of the Society of Mary and the Daughters of Mary Immaculate, Blessed William Joseph Chaminade, Venerable Marie Thérèse de Lamourous, and Blessed Adèle de Batz de Trenquelléon. During the focus groups, participants recalled the stories that presenters shared about the founders and the struggle the founders faced to succeed with their goals. Participants also appreciated learning about eighteenth century France. One participant shared the sentiment of the group when he stated, “I knew about France, but I learned so much more during our formation. It helped me understand the context in which Blessed Chaminade lived and worked.” Another associate added, “Learning about France and the founders deepened my understanding of the Marianist values and charisms.”

All associates felt “deeply touched by what it took to build the Society of Mary.” Participants affirmed that during the lectures or the viewing of a play on the founders, they were “inspired by the founders’ strength, devotion to Mary, and vision” and “were called and inspired to apply the same values in their professional and personal lives.” One participant exemplified the feelings of his colleagues when he said,

Knowing all they had to do and fight, I felt compelled and called to do my part with the Marianist values and charisms. I am a better person, employee and community member because I am trying harder to enact the Marianist values.

Learning about the founders of the Society of Mary gave the participants confidence to share the Marianist values with others and to enact them in their work-places.

Marianist Values Enacted. Participants explained that the formation empowered them in various ways. First, modeling after the founders of the Society of Mary, they “strive to be better listeners.” One associate captured the group’s perspective when he shared:

Because of the MEA program, my daily goal is to improve my listening skills. To do that, I seek feedback, and force myself to listen without interrupting the person who is speaking. Before attending the MEA, I was a lousy listener, I am now getting better.

Other participants spoke about the virtue of patience in these terms:

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

Related to patience, another associate shared “It is always about the people in the end and Blessed Chaminade taught us that.” Another disposition of the founders is that they were welcoming. As a result, associates shared that they go “the extra mile to be welcoming to others, new employees, students, staff, and to be more inclusive.” One person summarized this idea when stating, “We want to model what we were taught and being welcoming and inclusive is a big part of being a Marianist institution.” Other associates declared “thinking broader after the formation. Not just for ourselves but we are a bigger family. We have to play our part to help raise that family.” Another area affected by the formation was the leadership style of the participants.

Leadership Style Impacted by Formation. Out of the 35 associates interviewed, 20 held position of formal leadership. They all asserted that the formation changed the way they made decisions. One person expressed the idea of the group when he shared: “Before the formation, I would make decisions without asking the perspectives of others. This has changed drastically since the formation. I now ask my team to make certain decision, I learned to empower them and to delegate.” Another participant added, “We learned the power of teamwork and different

perspectives, so I always try to empower others, it does not matter the title of the person.” A third person shared that “The formation changed the way I lead and want to lead. Blessed Chaminade was modest and I need to be that too.” All participants mentioned the fact that they “Now see the strengths in people rather than focusing on the flaws.”

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

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

These findings demonstrated that participants transferred the knowledge shared during the formation by gaining confidence, by being better listeners, by being more patient, being more inclusive, and by being welcoming. Additionally, associates altered their leadership styles and broadened their way of thinking by embodying and modeling the Marianist core values and principles in order to promote the school’s mission. The second research question examined what dimensions of the MMLT enhanced the transfer of learning.

Enhancers of Learning Transfer. For this research question, the researcher used the dimensions of the MMLT to categorize the 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. Factors that enhanced the transfer of learning were related to culture, facilitator, and context and environment. Participants did not mention anything that would fall into the categories of pre-training, learner, content and materials, or follow-up. As a result, there weren't any findings related to these dimensions of the MMLT.

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

Facilitators. All participants agreed that having guest speakers provided rich experiences. The associates appreciated having guest speakers such as the former president of the institution because if he took time to come speak to the group, it meant that the information was important to hear and implement later. The associates also enjoyed having a diverse group of speakers. One group member summarized this sentiment by stating, "guest speakers were all different and all

brought a different theoretical or practical knowledge, it helped us seal the theory into practice.”

In addition to the facilitator dimension, a third domain of the MMLT helped the transfer of learning: Context and Environment.

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

Participants shared that the factors promoting their transfer of learning were related to the culture of the MEA program and the various guest speakers. The cohort model also allowed for people from diverse departments and positions to attend the program and learn from each other. The third research question sought to understand what dimensions of the MMLT inhibited the transfer of knowledge.

Inhibitors of Learning Transfer. Factors that inhibited the transfer of learning were related to the following dimensions of the MMLT: learners, facilitators, content and materials, context and environment as well as follow-up. There weren’t any findings related to culture or pre-training because participants did not mention anything for these categories.

Learners. All participants felt insecure committing to be a Marianist Educational Associate and not knowing if they were ready for the task. They repeatedly said, “How do we know we are ready?” or “Am I prepared, and qualified?” Despite being an MEA, the associates often wondered how they were doing and if they were on track with what was expected of them. All participants shared that they did not know what their duties were after having gone through the formation. One person shared: “What are we supposed to do, is there a list of things we

should be doing and expectations, so we know if we are on track?” These insecurities appeared to have prevented some of the associates from participating in activities or from performing their duty as an MEA. One associated said: “Not knowing makes us complacent, we want to do and help, and we try but we need to know what is expected of us so that we can implement what we have learned and impact others.” Another factor that impacted the transfer of learning was related to the facilitators.

Facilitators. All participants asked for more time for class discussions. While associates enjoyed the guest speakers, they also wanted to have more time for in-class conversations. One participant said, “We learn by being in community so we should have time to be in community and learn from peers.” Expanding on this idea, another participant added, “Instead of a lecture model only, it would be good to have reflection and group discussion time to allow us to process, understand, and unpack the learning.” Participants view the lecture model as “wasted opportunities to learn from the experiences and views of others.” Associates also asked for less lectures and more doing because adults learn by doing. The third element that prevented learning transfer dealt with content.

Content and Materials. Adults learn by doing. As a result, participants asked for a project to do during the program so that they can implement the knowledge and concretely apply the theory. Associates stated that “The project could be with sister Marianist institutions such as a high school or other universities locally or globally.” In terms of the project and content, associates also wondered how they could be in touch with the other two Marianist universities in the United States. They also stated wanting “tangible takeaways included in the materials and next steps so that we can implement and fulfill our duty as MEA.” They suggested having a check list or a document that lists the takeaways after each session and how to apply them. The

next area that hindered the transfer of knowledge was Context and Environment.

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

Follow-Up. All associates were concerned with the same question: “How do we continue learning? How do we refresh the knowledge?” They suggested reflection questions and materials being sent using technology. All participants were in favor of using “Isidore or Google Drive to share documents, readings, and questions.” One person even suggested having blogs for the MEA as “a way to express what we feel, unpack, and stay in community during and after we finish the formation.” To sum up, inhibitors to learning transfer were connected to learners, facilitators, materials and content, context and environment as well as follow-up. The next section presents a discussion of the findings.

Discussion

Multidimensional Model of Learning Transfer. The MMLT offers a comprehensive

and holistic approach to organizing, delivering and following up post formation in order to enhance the transfer of knowledge and promote and sustain vision. Findings from this study demonstrated that the dimensions of the MMLT pertaining to pre-training and follow-up were not addressed in the enhancers of learning transfer. This could explain the participants' wish for pre-training information including knowing the desired formation outcomes, participating in refresher classes, taking part in follow-up activities post training.

The MMLT and its checklist (Appendix A) could be used by program organizers, facilitators, 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 before, during and post formation. Facilitators can use it as a tool for self-reflection to improve their performance and facilitation. Funders can use it to determine which dimensions of the model require additional funding to provide the desired outcomes and enhance learning transfer. Participants can use the MMLT as a feedback tool for organizers, facilitators, and funders.

Facilitators and Adult Learning Theory. According to Knowles (1975), andragogy is the art of teaching adults, whereas pedagogy deals with the teaching of children. The concept is based on the belief that the learning needs of adults differ from those of children (Thompson & Sheckley, 1997). The core principles of andragogy are that adults have a psychological need to be self-directed, they need to base their learning on their own wealth of experiences, and are ready to learn when they can put their learning directly into action and can see a connection between their lives and what they learned in the classroom (Knowles, 1975, 1980). Participants in the MEA asked to put the theory into practice by “doing a project.” They also asked to have “tangible outcomes” so that they could apply the new knowledge to their position.

In Knowles' (1975) andragogy, teachers become facilitators of learning and are tasked

with giving the participants the skills necessary to become self-directed learners. In other words, facilitators guide the learning rather than managing it (Laird, Holton, & Naquin, 2003). In doing so, the facilitator no longer holds all the knowledge but rather shares it with the participants; learning takes place as a result of the collaborative process (Knowles, 1975, 1980, 1989). In this study, the participants expressed their desire to have additional “collaborative time to discuss the content learned.”

Transformative Learning theory (TL) is a rational process that aims to develop autonomous thinking (Mezirow, 2000). In Transformative Learning, learners reflect and discuss their assumptions about the world by engaging in reflective discourse in order to change their frames of reference and consciously discover new ways of defining their worlds. Mezirow (2000) maintains that for learners to change their meaning schemes, which are their beliefs, attitudes, and emotional reactions, they must engage in critical reflection, which eventually leads to a transformation in perspective. In this study, participants asked to have additional time for reflection and to receive reflection prompts or questions based on their readings. Sheckley and Bell (2006) use the term “Velcro strips” to suggest that adults learn by doing, reflecting, and using their experiences as metaphorical “Velcro strips” onto which new concepts and ideas can stick. Experiences are the foundation of consciousness and they enable learners to extend their consciousness to new and diverse situations beyond their previous experiences. Based on adult learning theories and best practices, facilitators should involve the participants in group discussions, reflection, and journaling. The findings of this research support both Knowles (1975) and Mezirow’s (2000) theories.

Follow-Up Using Technology. In this study, participants of all cohorts asked how they could keep up with the knowledge they had gained. They asked for “refresher trainings.” They

stated “How do we continue learning? How do we refresh the knowledge?” One way post training might be effectively done is by using technology to keep learners motivated, encourage them, and provide follow-up.

Technology could be used in different manners to support the transfer of learning over time and prevent training relapse, in which participants fall back to their habits and old ways of doing. Participants in this research suggested a Google Drive since every employee has access to it. They also mentioned that Isidore, an online platform, would be a good way to share readings, questions, documents, videos, and other materials related to the formation. Finally, participants suggested the creation of a blog for MEA using the Google or Isidore platforms.

Another way to follow up post training would be the use of mobile technology (Brion, 2018). *WhatsApp* is an application that allows anyone with access to a smartphone, data plan, or Wi-Fi to send individual and group messages anywhere in the world. It also allows sending and receiving photos, videos, recordings, and Word documents. *WhatsApp* could be used to create a MEA group and to send text messages to all associates. The text messages would be conversation triggers related to the content of the formation. Text messages could also be reflection prompts, readings, videos, or pictures. *WhatsApp* allows participants to continue their learning by increasing the motivation to transfer knowledge, reminding them of the content of the training, and offering some encouragement. Learning transfer is the goal of any teaching, but it is challenging to attain. Mobile technologies, such as *WhatsApp* can enhance learning transfer (Brion, 2018).

Next the researcher provides some recommendations for scholars and professional development organizers.

Recommendations

The researcher offers recommendations for Catholic institutions that are seeking to improve formation programs to enhance and sustain the mission of religious institutions. First, organizers should consider using the MMLT and its checklist as a way to prepare, deliver, and follow-up after professional development events because the MMLT provides a holistic approach to learning transfer. The MMLT has dimensions that either enhance or hinder learning transfer. These dimensions are culture, pre-training, learner, facilitator, content and materials, context and environment, as well as sustainable follow-up. Each of these areas should receive attention before, during, and after a formation takes place.

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

Another area of the MMLT that deserves attention is content and materials. In this dimension, participants asked for more time to reflect in class and out of class. They also asked for time to collaborate and learn from peers. This could be accomplished by providing time in each session for group discussions and projects. Projects could involve working in the

community and/or with other Marianist institutions locally or globally. Program content could also be supported by a shadowing program. This shadowing program would allow participants to follow an MEA alum to see how they enact and implement the knowledge in their position. This would also enhance the confidence of the newly committed associates.

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

Conclusion

The purpose of this study was to examine if and how university employees were able to apply a deeper understanding of Marianist mission and identity to their work. Findings revealed that all participants transferred knowledge to their positions. The transfer often was more qualitative than quantitative because it had to do with gaining confidence and credibility on knowledge related to the Marianist values and charisms. Findings also indicated that the MMLT is an effective way to promote learning transfer and understand what supports or inhibits it. In this study, factors related to culture, facilitators, and context and environment enhanced the

transfer of understanding the institutional mission. Inhibitors were pertaining to learners, facilitators, content and materials, content and environment as well as follow-up.

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

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Figure 1. A Multidimensional Model of Learning Transfer



Appendix A

Checklist for Formation Organizers

Instructions for using the checklist.

Purpose

The purpose of this checklist is to help formation organizers and facilitators enhance the transfer of knowledge and skills to the workplace in order to sustain mission.

Who can use the checklist?

All stakeholders, formation organizers and facilitators are encouraged to use this checklist before, during and after a training.

How does it work?

This checklist is designed to help organizers think through 7 dimensions before, during and after the training. These dimensions are culture, learner, facilitator, content and materials, context and environment, and follow-up. Within each of these dimensions, there are several items organizers can check when accomplished.

Culture

- Understand the role of organizational, departmental, and other micro culture in transfer of knowledge
- Understand the role of societal culture
- Understand how culture affects leadership styles
- Understand how culture affects the way individuals resolve conflicts
- Understand that culture affects how trainers, organizers, and supervisors view the world and react to it
- Understand that culture affects men and women, as well as youth and elderly differently
- Understand the need to be culturally competent, creating a personal cultural capital
- Understand the culture, micro and macro, in which the formation takes place and for who the formation is delivered

- Understand that culture is individualistic or collectivistic; would determine how trainers deliver the formation

Pre-Training/ Pre-Formation

- Facilitators' meeting: review of materials, participant overview, share schedule & other logistic information, and share any other valuable information about formation, and content and participants
- Needs assessment of participants and organization
- Goal setting with participants
- Orient supervisors & facilitators to discuss goals, approach, and follow-up
- Communicate expectations to all stakeholders: provide hooks to motivate participants to attend and transfer knowledge
- Explain the benefit of PD, who is it going to benefit, culturally relevant content, and make sure the PD meets the participants' needs and organization's needs.
- Explain that implementation is expected
- Share joining instructions, briefing notes, and pre-training questionnaire
- Does the institution have sufficient resources (e.g., manpower, staffing) to cover the job responsibilities of participants while they are attending formation?
- Are resources (e.g., time, equipment) available to participants to support the use of learned skills post-formation?

Learner

- Understand the levels of motivation
- Understand the cultural background of all stakeholders
- Understand that different learning styles will be present in the formation
- Understand different languages and writing styles might be present in the formation
- Understand one's beliefs and attitudes towards his/her job
- Understand one's beliefs about the efficacy of the formation
- Understand the consciousness level of participants

Facilitator

- Facilitator is culturally competent
- Understand the cultural background of all stakeholders
- Understand that different learning styles will be present in the formation
- Understand different languages and writing styles might be present in the formation
- Facilitators have the dispositions necessary to be an effective facilitator
- Facilitator uses adult learning to deliver formation, including modeling, student centered approaches
- Facilitator uses action plans to help participants set implementation goals for themselves
- Facilitator sets objectives and makes sure to follow up on them during the formation
- Facilitator avoids cognitive overload and uses time wisely using germane culturally relevant content

Content and Materials

- Materials are evidence-based, culturally relevant, and contextualized
- Pedagogical approach used is adult friendly and based on how adults learn best by doing, active learning, case studies, local songs and stories, and modeling
- Use of action plans for short term and long-term goals
- Link formation to organization mission and vision
- Practice distributed practice and feedback
- The content and materials take into consideration the pace and the sequence of the learning

Context and Environment

- Understand that micro and macro culture influence knowledge transfer
- Give enough time to transfer
- Understanding by all stakeholders of work environment, socio-cultural context
- Climate that fosters transfer: peer and supervisor support, post-formation meeting, feedback, and support for action
- Peer contact and support

- Presence of social networks: buddy system and online networks

Sustainable Follow-Up

- Mentor facilitated networks
- Use Of mobile learning
- Include modeling, and reflection
- Use of refresher courses