Problems experienced by the School Management Team in facilitating transfer of training

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Dedication

This mini-dissertation is dedicated to the my late parents, Gaborekwe Festus and Mamofokeng Nkeae Elizabeth, who supported my studies, may their souls rest in peace. To my family, my wife Caroline Jeanette and my children Boipelo and Kutlwano who stood by me through thick and thin.

SUMMARY

A lot of changes have occurred in the Department of Education (DoE) since 1994. These changes require teachers to study, implement and assess learner outcomes while providing meaningful, engaged learning for a diverse learner population. To enable teachers to cope with changes in the education system, training and retraining of educators has become a major focus of the Department of Education (DoE). The Department of Education needs to ensure that training provided equips teachers with new knowledge and skills and thus enable them to provide education of high quality.

Through the decentralization policy that characterises the new education dispensation in South Africa, School Management Teams (SMT) are required to see to it that training of teachers yields the desired results. To this end the School Management Team (SMT) should facilitate transfer of training among educators by providing ongoing support and coaching to trained educators. Ongoing coaching represents the concrete involvement of managers (principals) and supervisors (heads of department) in work-related transfer efforts.

It appears, however, that SMTs are experiencing problems in facilitating transfer of training among educators in schools. These problems emanate from three key members of the training partnership, viz., managers, trainees and trainers. In general, problems seem to be related to trainee characteristics, work environmental factors, and training design and delivery. As a result, a research was undertaken to investigate the perceptions of SMTs about the seriousness of problems that they experience in facilitating transfer of training with the major aim of coming up with suggestion about how these problems can be eliminated.

A cross-sectional empirical survey design using a questionnaire was used to collect data from 70 SMT members in 10 schools. The major findings from the research show that SMTs experience serious to very serious problems in the areas of providing time for professional development activities within the regular school day, giving incentives to educators for practicing skills learned in training, and providing resources that educators need to apply their newly gained skills. The major recommendation from this research concerns the training of SMTs in facilitating transfer of training prior to training of teachers.

Key words:

Training, development, professional development, training transfer, educator, school, education, management, facilitation.

OPSOMMING

Daar het sedert 1994 baie dinge in die Departement van Onderwys (DvO) verander, wat dit vir onderwysers nodig maak om leerderuitkomste te bestudeer, te implementeer en te assesseer, en terselfdertyd vir 'n uiteenlopende leerdersbevolking betekenisvolle leermateriaal aan te bied, wat leerders aktief betrek. Ten einde hulle in staat te stel om die veranderinge in die onderwysstelsel te hanteer, word die opleiding en heropleiding van opvoeders 'n belangrike fokuspunt van die DvO – die verantwoordelike party wat moet toesien dat die opleiding wat gegee word opvoeders toerus met nuwe kennis en vaardighede wat hulle in staat te stel om hoëgehalte onderwys te gee.

Ooreenkomstig die desentralisasiebeleid wat die nuwe onderwysbedeling in Suid-Afrika kenmerk word daar van Skoolbestuurspanne verwag om te sorg dat onderwyseropleiding die gewensde resultate oplewer. Om dié rede moet die Skoolbestuurspan 'n proses van opleidingsoordrag onder opvoeders fasiliteer deur hulle deurlopend te ondersteun en opvoeders te onderrig – wat weer op sy beurt die konkrete betrokkenheid van bestuurders (hoofde) en toesighouers (departementshoofde) in werkverwante opleidingsoordragpogings weerspieël.

Dit blyk egter dat Skoolbestuurspanne dit moeilik vind om die oordrag van opleiding onder opvoeders by skole te fasiliteer. Die probleem lê by die drie lede van die opleidingsvennootskap, te wete bestuurders, leerders (in dié geval onderwysers, wat opgelei word) en opleiers (diegene wat die opleiding gee). Probleme skyn in die algemeen met leerderkenmerke, werkomgewingsfaktore en die ontwerp- en aanbied van opleiding verband te hou. Om dié rede, handel hierdie navorsing oor die persepsies van Skoolbestuurspanne rakende die ernstigheidsgraad van die probleme waarmee diegene wat opleidingsoordrag fasiliteer te kampe het. Die belangrikste doel van die

navorsing is om voorstelle aan die hand te doen oor hoe genoemde probleme uitgeskakel sou kon word.

Ten einde die data van 70 Skoolbestuurspanlede te versamel, is 'n dwarssnit empiriese opname, wat van 'n vraelys gebruik maak, by 10 skole gedoen. Die belangrikste bevindinge uit die navorsing toon dat Skoolbestuurspanne ernstige tot baie ernstige probleme ondervind wat die volgende betref:

- Hoe om in 'n gewone skooldag tyd te maak vir professioneleontwikkelingsaktiwiteite;
- Hoe om opvoeders met prestasielone (insentiewe) aan te spoor om die vaardighede wat tydens opleiding aangeleer is, prakties toe te pas; en
- Hoe om die hulpbronne daar te stel wat opvoeders nodig het om die nuwe vaardighede wat hulle geleer het, te kan toepas.

Die belangrikste aanbeveling uit hierdie navorsing het daarmee te make dat Skoolbestuurspanne opgelei moet word om opleidingsoordrag onder onderwysers by skole te fasiliteer *alvorens onderwysers daarin opgelei word*.

Sleutel woorde:
Opleiding, ontwikkeling, professionele ontwikkeling, opleidingsoordrag, onderwyser, skoolonderwys, bestuur, fasilitering.

ACRONYMS

DoE   :   Department of Education

OBE   :   Outcomes Based Education

NCS   :   National Curriculum Statement

IQMS   :   Integrated Quality Management Systems

SMT   :   School Management Team

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CHAPTER 1

ORIENTATION

1.1 INTRODUCTION

Since 1994, a number of changes have occurred in the Department of Education (DoE). The South African Schools Act (SA,1996) and the introduction of Outcomes Based Education (OBE), National Curriculum Statement (NCS) and Integrated Quality Management Systems (IQMS) require educators to study, implement and assess learner outcomes while providing meaningful, engaged learning for a diverse learner population (Du Plessis, Conley & Du Plessis, 2007:106). According to Tam and Cheng (1996:17) education changes require educators to acquire new knowledge and skills to enable them to provide education of high quality. Training and retraining of educators has thus become a major focus of the Department of Education (DoE).

The School Management Team (SMT) should see to it that training of educators yields the desired results. To this end the School Management Team (SMT) should provide ongoing support and coaching to trained educators. Ongoing coaching, according to Holton III and Baldwin (2003:258), represents the concrete involvement 'of managers (principals) and supervisors (heads of department) in work-related transfer efforts.

1.2 PROBLEM STATEMENT

Transfer of training may be defined in different ways. According to Holton III and Baldwin (2003:165) transfer of training is the degree to which employees use newly acquired knowledge and skills to perform their job effectively and enhance organizational effectiveness. Gumuseli and Ergin (2002:81) and Kraiger (2002:263) define transfer of training as the process of the implementation of knowledge, skills, attitudes and other qualities acquired in the training programme at the workplace. Els

(1992:1); Wortley (1997:1); Elangovan & Karakowsky (1999:268); and Taylor (2000:5); and, refer to transfer of training as the effective application of the knowledge and skills gained as a result of attending an educational program. Machles (2002:34) emphasizes that the ultimate goal of training is the educator's ability to "use concepts learned in training in their practice. From the above definitions it is clear that transfer of training is the process of implementing knowledge, skills, attitudes and other qualities acquired in the training programme at the workplace.

Transfer of training may be positive or negative. Positive transfer of training occurs when educators apply the knowledge, skills and attitudes gained in the training context to the job (Leberman, McDonald & Doyle, 2006:4). According to Kraiger (2002:263) the way educators use and modify training to suit their needs must have an impact on job performance if the training is to be considered to have some value. Negative transfer of training refers to a decline in performance after training or where training does not bring any change in the behaviour of the educator (Kraiger, 2002:53). Schools need positive transfer of training because it is the only way in which Departmental policies can be implemented effectively as it enables educators in a school to achieve full performance on the job (Broad & Newstrom, 1992:ix). However, if negative transfer occurs, neither the educator nor the school or DoE profit from the training.

Many factors in the pre-, concurrent-, and post-training efforts lead to failure of transfer of training. Factors relating to the trainee such as their motivation, interest, knowledge or skills and their participation influence the degree of transfer of training (Elangovan & Karakosky, 1999:269; Gumuseli & Ergin, 2002:81). The work environment including supervision, peer support and opportunities to practice what was learned also affect transfer of training (Clement & Vanderberghe, 2001:43; Machles, 2002:32; Thompson, Brook & Lizarraga, 2003:540; Gitonga, 2006:989). Moreover, the DoE mostly uses the cascade model of training whereby those trained by facilitators are expected to train other educators who did not undergo such training (Mathekga, 2004:19; Van der Westhuizen, Mosoge & Van Vuuren, 2004:708). Given the problems experienced with regard to in-service training of educators and specifically the use of the cascade model

(Mathekga, 2004:68-69), it may be deduced that the DoE is not getting value for its money.

- The School Management Team has the responsibility to ensure that transfer of training occurs so that the school can benefit from the off-site training offered by the Department of Education through subject advisors and NGOs. While many factors that impede transfer of training need the attention of the programme designers, structural and cultural conditions (Clement & Vanderberghe, 2001:44) are well within the competence of the SMT. The SMT can facilitate transfer of training by (Elangovan & Karakosky, 1999:271; Clement & Vanderberghe, 2001:44-45; Smith, 2003:211; Barth, 2006:9-11):

- initiating a feedback sessions by those who are from training,
- providing opportunities to perform learned behaviour on the job,
- providing time for professional development within the regular school day,
- ensuring that relevant educators attend the training programme, and
- providing support, mentoring and follow-up to trainees.

It appears SMTs face problems in facilitating transfer of training. In many schools SMTs make minimal or no effort to carry out the above activities to facilitate transfer of training. It may be that SMTs are not knowledgeable about facilitation of transfer of training. It may also be that SMTs have little time (Du Plessis, *et al.,* 2007:105) to engage in these activities. Whatever the reasons for the failure to facilitate transfer of training effectively, it is apparent that too often SMTs leave educators on their own to implement what they have learned (Maldonado & Victoreen, 2002:5). Thus, the problem in this research revolves around the problems that face SMTs in facilitating transfer of training.

Many studies have been conducted on transfer of training (Els, 1992; Wortley, 1997; Nunes, 2003; Khoza, 2006), but none has investigated the problems that School Management Teams face in facilitating transfer of training among educators. For

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purposes of this research, therefore, the following problem questions were discussed:

- What is the nature of transfer of training?
- What problems are experienced by SMTs in facilitating transfer of training among educators?
- What guidelines can be set to assist SMTs in overcoming these problems?

1.3.   RESEARCH AIMS

1.3.1. To analyse the nature of transfer of training in schools.

1.3.2. To identify problems that SMTs experience in facilitating transfer of training among educators.

1.3.3. To suggest guidelines to assist SMTs in overcoming the problems related to facilitation of transfer of training

1.4.   RESEARCH DESIGN AND METHOD OF RESEARCH

1.4.1   Literature study

The first aim of the research, viz., to analyse the nature of transfer of training in schools, was be achieved through an in-depth literature study whereby different opinions and perceptions of authors were collated, compared and reported. The relevant literature was located in the library through the use of various datasearch tools such as, EBSCOhost (Econlit, Eric), ProQuest, Google scholar and Sabinet, using the following descriptors:

Training, development, professional development, training transfer, educator, school, education, management, facilitation.

The researcher will also consult internet websites including

- http://www.workinfo.com
- http://www.pscbc.org.za
- http://www.en.wikipedia.org
- http://www.businessperform.com

1.4.2. Empirical research

1.4.2.1 Quantitative research method

A cross-sectional empirical survey design was followed. This involved the use of a quantitative research approach. This research approach adopts a positivist philosophy of knowing that emphasises objectivity and quantification of phenomena (McMillan & Schumacher, 2001:31). As a result, the research design maximised objectivity by using numbers, statistics, structure, and experimenter control (De Vos, Strydom, Fouche & Delport, 2005:75).

The aim with this design will not be to determine cause-and-effect but to survey the views of respondents and summarise facts and opinions through statistical analyses (Leedy & Ormrod, 2005:179).

1.4.2.2 Structured questionnaire

To this end a structured questionnaire was deemed suitable for purposes of identifying problems experienced by SMTs in facilitating transfer of training. The structured questionnaire enabled the researcher to collect large amounts of data and to learn about a large population within a short period of time. The theoretical discussion on the nature and problems related to transfer of training served as the basis for deriving the

categories and individual question items that were be included in the questionnaire.

1.4.2.3. Population and sample

This study was conducted in 24 schools in the Itsoseng Cluster. This Cluster has a total of 305 educators (24 Principals, 96 Heads of Departments and 185 Cs educators). Firstly a random sample of schools was made from a list of all the 24 schools and, using a table of random numbers, 10 schools were selected. In this way each member of the population of schools had an equal chance of being selected (Leedy & Ormrod, 2005:199; Mouton, 2006:138).

Through purposive sampling a total of 70 SMT members were involved in the study, assuming that on average each school has 4 Heads of Department and one principal (N=70). Purposive sampling will be used because the SMT members are knowledgeable about problems involved in facilitating transfer of training. This satisfied the requirements that in purposive sampling respondents are selected according to a specific purpose rather than randomly (Tashakkori & Teddlie, 2003:713).

1.4.2.4. Data collection and analysis

The researcher delivered and collected questionnaires personally from the participating schools to ensure a high response rate. The researcher set up an appointment with the selected school and request that all Heads of Department and the principal gather in a room to fill in the questionnaire. In this way the researcher was able to explain the purpose of the research and guide respondents in completing the questionnaires. This also enabled the researcher to respond to problems that respondents may encounter in responding to the questionnaire.

Data was analysed using frequencies, percentages and mean scores in order to summarise the data and obtain an overall picture of patterns and tendencies presented by the data. Furthermore the mean score ranking techniques was used in order to

determine the most and the least important problems facing School Management Teams.

1.4.2.5 Validity and reliability

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Validity of a measuring instrument is the extent to which the instrument measures what it is supposed to measure (Best & Kahn, 2003:283; De Vos, *et al* '2005:160; Mouton, 2006:109). To achieve validity, a pilot study was undertaken to ensure that respondents understand the questions. Moreover a factor analysis was conducted to find out the intercorrelations between different question items within each of the categories of the questionnaire.

Reliability is the consistency with which a measuring instrument yields a certain result when the entity being measured has not changed (Leedy & Ormrod, 2005:29; Mouton, 2006:144). The Cronbach Alpha coefficient was applied to all sub-sections of the questionnaire in order to establish the internal consistency of individual question items. Reliability of the questionnaire will also be inferred by comparing the results of the pilot study with those of the main empirical research.

1.5 ETHICAL CONSIDERATIONS

Approval was obtained from the NWED, via the office of the Cluster Manager. The participating schools were informed of the proposed project and permission letter to conduct a research will be given to the Principals and educators. The respondents were informed about the issues of informed consent, anonymity, confidentiality and voluntary participation (Coleman & Briggs, 2002:79; Koshy, 2005:23-24).

The questionnaire and procedures to be followed by the researcher in the empirical study was submitted to the North West University's Ethics Committee for approval. The said ethics committee approved the research and allocated it an ethics number. The researcher is known among and has built a rapport with the respondents through

professional encounters. The respondents know that the researcher is "one of them" and care about their total well-being in their role.

1.6 CONTRIBUTION OF THE STUDY

The study will contribute to a better understanding of the problems of effective transfer of training and assist School Management Teams in their efforts to facilitate transfer of training among educators. Training offered by the Department of Education will be more successful and the Department will get value for its money in subsequent training sessions. In turn this will lead to an improved staff corps that will contribute to the effective functioning of schools.

1.7 PROPOSED RESEARCH CHAPTERS

This research is given in five chapters:

Chapter 1   :   Orientation
Chapter 2   :   The nature of and problems related to transfer of training in
                      schools.
Chapter 3   :   Empirical design
Chapter 4   :   Analysis and interpretation of data.
Chapter 5   :   Summary, findings and recommendations

CHAPTER 2

THE NATURE OF AND PROBLEMS RELATED TO TRANSFER OF TRAINING IN SCHOOLS

2.1   INTRODUCTION

This chapter focuses on the nature, scope and manifestation of the focus area in question, namely, the problems experienced by SMT's in facilitating transfer of training among school educators to their workplaces or into their teaching practice. Although the phenomena of transfer of training are complex, the sources that have been consulted will help to clarify it. An in-depth study will lead to the greater understanding of the problems that educators encounter in order to transfer their learning to their work practice setting. To clarify the complexity of the phenomenon, the concept transfer will be explained in detail.

2.2   DEFINITION OF CONCEPTS

2.2.1 TRAINING

The term *training* refers to the acquisition of knowledge, skills, and competencies as a result of the teaching of vocational or practical skills and knowledge that relate to specific useful competencies (Phillips & Broad, 1997: 109). It forms the core of apprenticeships and provides the backbone of content at institutes of technology. In addition to the basic training required for a trade, occupation or profession, observers of the labour-market recognize today the need to continue training beyond initial qualifications: to maintain, upgrade and update skills throughout working life. People within many professions and occupations may refer to this sort of training as professional development (Mathekga, 2004: 15).

Some commentators use a similar term for workplace learning to improve performance: training and development. One can generally categorize such training as *on-the-job* or *off-the-job*:

- o On-the-job training takes place in a normal working situation, using the actual tools, equipment, documents or materials that trainees will use when fully trained. On-the-job training has a general reputation as most effective for vocational work (Smith-Jentsch, Salas, & Brannick, 2001: 280).

- o Off-the-job training takes place away from normal work situation – implying that the employee does not count as a directly productive worker while such training takes place. Off-the-job training has the advantage that it allows people to get away from work and concentrate more thoroughly on the training itself. This type of training has proven more effective in inculcating concepts and ideas.

2.2.2 TRANSFER OF TRAINING

Transfer of training involves many factors. When we talk about the transfer of training we are interested in the extend to which teaching is transferred from one context to another (Leberman, *et al.* 2006: 1). Broad and Newstrom (1992: 6) define transfer of training as the effective and continuing application by trainees to their jobs, of the knowledge and skills gained in training , both on and off the job. This means that trainees apply all they learned in training to their jobs, at least as well as they could demonstrate those skills at the end of the training program. Full transfer of training also means that with practice on the job, the level of skill with which that learning is applied will increase beyond the level demonstrated at the end of the training period (Khoza: 2006: 35).

Gagne, Briggs and Wager (1993: 235) defines transfer of training as the application of knowledge learned in one setting or for one purpose to another setting and/ or purpose. Similarly, Holton III & Baldwin (2003: 165) and Schunk (2000: 206) defines transfer of training as the degree to which employees use newly acquired knowledge and skills to perform their job effectively and enhance organizational effectiveness. Gumuseli and

Ergin (2002: 81) refer to transfer of training as the process of implementation of knowledge, skill, attitude and other qualities acquired in the training programme into the workplace.

Haskell (2001: 23) defines transfer as the way in which previous learning influences current and the future learning, and how past or current learning is applied or adopted to similar or novel situations. Haskell further sees transfer as "the carrying over of meaning from one situation to another" (2001: 26). Furthermore, transfer is the "effect of previous learning on new learning or problem solving." Transfer of training is the magical link between the classroom performance and the real performance that one is expected to do in real life illustrating that transfer of learning takes place when one think, plan, reason and make good decisions (Haskell, 2001: xiv).

From the above definitions, it is clear that transfer of training is concerned with the acquisition of knowledge, skills and attitudes and the application of these knowledge, skills and attitude to the work environment or to another situation (Van Camp, 1996: 79). Successful application leads to an improvement in the job performance and has a lasting effect (Leberman *et al*. 2006: 2). Therefore, transfer of training occurs when prior-learned knowledge and skills affect the way in which new knowledge and skills are learned and performed.

2.2.3   TRANSFER PROBLEM

Transfer problem occurs when transfer of training does not take place. Broad & Newstrom (1992: 7) lament that there is a growing recognition of a "transfer problem" in organizational training these days. There is a concern that billions of rands are spend annually on training and development, but not more than 10% of these expenditures actually result in transfer to the job. Researchers have similarly concluded that much of the training conducted in organizations fails to transfer to the work setting (Broad & Newstrom (1992: 7).

Gumuseli & Ergin (2002: 81) and Els (1992: 4) pointed to "mounting evidence that shows that very often the training makes little or no difference in job behaviour". They

identify three necessary conditions for transfer which are: (1) training content must be applicable to the job; (2) the trainee must learn the content; and (3) the trainee must be motivated to change job behaviour to apply what was learned. The last condition requires "rewards and punishment, incentives and deterrents in the job situation" to support transfer and these are under management's control.

Broad & Newstom (1992: 9) uncovered a wide range of difficulties in achieving transfer of training in many organizations. They argue that there is not training situation without a transfer problem. Training situations vary greatly in the number and complexity of transfer problem they present.

For some types of training in technical skills with clearly defined procedures, the job situation itself supports immediate transfer. In this situations transfer problems can be identified promptly and appropriate corrective actions taken quickly. However, in other technical skill situations, transfer problems are not immediately recognised or effectively addressed. For example the supervisor may discover repeated errors from the trainee but may not know what corrective action to take. A Mathematics educator may make mistakes in calculations which are not found promptly. If the problems are not constructively and promptly addressed, errors become habits and desired new skills deteriorate.

For other types of training in complex, less clearly defined skills, like management decision making or interpersonal communications, the opportunity to apply new skills may not arise immediately, and the job situation often does not provide direct support for transfer of those skills (Broad & Newstrom, 1992: 9). Transfer problem may not be identified easily, and corrective actions may never be taken in an organised way. Employees may avoid using new skills they find difficult, or they may give up easily if they run into problems.

Factors external to the work site may also present problems for effective transfer of new skills. A re-organization may be so distracting that employees fall back on old habits

without trying new behaviours. The organizational culture may discourage risk-taking behaviour; trainees may be reluctant to try newly learned skills because they fear negative consequences for failure.

2.2.4 SCHOOL MANAGEMENT TEAM (SMT)

The Education Human Resource Management and Development manual (DoE 2000b: 2) state that the legislation does not define a SMT. The working definition of a School Management Team being used by provinces and the national department is that it consists of the following members:
- o Principal
- o Deputy principal (if appointed)
- o Heads of departments (either appointed or acting).

    An SMT may also bring in additional members of staff whom the management team feels has specific skills or knowledge which will aid the management of the school. Such additional member may or may not vote. However, most SMTs work on the basis of consensus, and not formal voting, to make decisions (Tyala, 2004: 25: DoE, 2000b: 2).

It is assumed that all schools will have an SMT, apart from one-or two-educator farm schools. The role of the SMT is to assist the principal with his or her management tasks and to share the management tasks more widely in the school. This is necessary if the management of the schools is to become more democratic, inclusive and participatory (Department of Education, 2000b: 2).

2.2.5 EDUCATOR

In terms of Employment of Educators Act 76 of 1998, an educator means any person who teaches, educates or trains other persons or who provides professional educational services, including professional therapy and education psychological services, at any public school, further education and training institution, departmental office or adult basic education centre and who is appointed in a post on any educator establishment under this Act. In this research the concept "educator" will not be used to denote school-

based educators rather than office-based educators in order to capture the notion of those people that are engaged in teaching at school level.

2.3   THE NATURE OF TRANSFER OF TRAINING IN SCHOOLS

In a school situation transfer of training occurs where an educator who is from a training program or a workshop, practice what he/she has learned to the job situation. This can also be done by sharing information from the training with colleagues or by practicing what he/she has learned in the classroom. According to Leberman *et al*, (2006:3) transfer is a core concept in learning and relates to both process and outcome. Transfer helps us learn by facilitating the storage, processing, remembering, and retrieving of information. Every time learning occurs previous learning is used as a building block. Not only is transfer a very important foundation of all subsequent learning, but it is also important for other cognitive activities such as thinking, reasoning, planning, metacognition, decision-making, and problem-solving. Transfer is therefore the very essence of understanding, interacting and creating. Furthermore, it is the ultimate aim of teaching and learning (Leberman *et al*. 2006: 3; Thompson, Brooks & Lizarraga, 2003: 540; and De Corte, 2003: 142).

Transfer of training helps organizations to maintain high quality standards and outcomes. According to Leberman *et al*. (2006: 3) the rapid growth in the knowledge, technology and scientific change combined with frequent job changes of workers, will favour those who have a broad-based and transferable set of behaviour and skills. Transfer of training, therefore, helps the trainee to adjust to new situations that are related to globalization. Leberman *et al*. (2006: 3) and Thompson, Brooks & Lizarraga, (2003: 540) contend that lifelong learning has become a necessity and transfer of learning provides the vehicle for this to occur.

The trainee (educator) and employer (DoE) want transfer to occur for the training to impact on the job. The transfer outcomes benefit both the employer and the employee and enhance development. For example, an employer may attempt to teach clerks to

use text-processing program in such a way that afterward they can easily and quickly acquire mastery of a new program (De Corte, 2003: 142).

2.4 DIFFERENT LEVELS AND TYPES OF TRANSFER.

Transfer does not only mean applying previous learning to new situation. It also means applying old knowledge in a setting sufficiently novel that it requires learning new knowledge (Leberman *et al.* 2006: 4). Transfer of learning is thus used in connection with knowledge, skills and attitudes that are relatively similar but occur in different contexts, as well as those that involve new learning. The levels of transfer depend on the subtle and marked differences in the type of transfer. Many of the differences lead to distinctions in how transfer is classified depending on the level of complexity of the transfer (Leberman *et al.* 2006: 4; Van Camp, 1996: 43).

2.4.1 Positive and Negative transfer

Positive transfer occurs when learning in one context improves learning or performance in another context (Goldstein & Ford, 2002: 129). For example, if someone learning a new database package has background knowledge of databases or has used a different database package, he is likely to benefit in terms of the time taken to learn the new package (Leberman, *et al.* 2006: 4 and Van Camp, 1996: 80; Schunk, 2000: 206).

In contrast, negative transfer occurs when previous learning or experience inhibits or interferes with learning or performance in a new context (Leberman, *et al.* 2006: 4, Goldstein & Ford, 2002: 129 Schunk, 2000: 206 and Van Camp, 1996: 80). For example, a person for who schooling was an unpleasant experience may avoid 'classroom' situations.

2.4.2 Simple versus Complex transfer

According to Leberman, *et al.* (2006: 4) simple transfer happens when little or no effort is required to apply what has been learned in one situation to a new situation. For example, in a class students are taught how to use a spreadsheet to create a budget. Later they need to create a budget for a club trip, and set up a spreadsheet for this. However, if the same students were engaged in gathering data for a research project

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and thought about the ways in which the spread-sheeting program could assist with data management and analysis, this would be complex transfer.

2.4.3 Near and Far transfer

These terms are used to distinguish the closeness or distance between the original learning and transfer. Near transfer includes situations that reflect the automatic triggering of well-practiced routines in circumstances where there is considerable perceptual similarity to the original learning context (Leberman, *et al.* 2006: 4 and Holladay & Quinones, 2003: 1095). An example, an educator who has been practising the old system of education can easily change to OBE. According Holton III & Baldwin (2003: 150); Van Camp (1996: 81) Holladay & Quinones (2003: 1095) and Johnson (1995: 34) near transfer occurs as a result of the similarity between the learning situation and the situation in which the skill is applied.

Unlike the near transfer, far transfer does not depend on superficial stimulus. This is because reflective abstraction often enables a person to see through superficial differences to deeper analogy (Leberman, *et al.* 2006: 5). According to Holton III & Baldwin (2003: 150) and Schunk (2000: 208) far transfer is used to refer to the transfer of learning from the school context to a non-school context. Similarly, Van Camp (1996: 81) and Johnson (1995: 34) add that far transfer is usually more difficult to achieve as it involves transfer to a very different context from the setting in which the skill is required. For example, when a learner applies the writing strategy learnt in an English class in writing the constitution for a sport club.

This type of transfer requires deliberate analysis of a situation in order for learners to recall the concepts or principles they need to apply their knowledge and skills in that particular situation. Far transfer results in the development of generic skills that are required and used in significantly different context and situation. However, in practice, learners often fail to apply knowledge and skills acquired in one context to another situation.

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2.4.4 Automatic and Mindful transfer

Kraiger (2002: 201) refer to automatic transfer as shallow, mindless, schema-driven, and peripheral. Kraiger contends that in automatic processing, simple decision rules are used rather than thorough analysis of information. Automatic transfer, therefore, occurs when an individual responds spontaneously within a transfer situation, which is very similar to the learning situation. For instance, learning to read English in one class, results in the learner automatically reading English language in another context.

Leberman, *et al.* (2006: 5) and Johnson (1995: 34) use the terms *low* and *high* road transfer to differentiate the mechanisms of automatic and mindful transfer. Gradually, with time and practice, the automatic transfer effect will extend or 'reach out' over the low road. For example, the student who is reading and writing in diverse subjects is slowly and gradually gaining expertise in reading English.

In contrast, mindful, high road transfer is deliberate and systematic process of making a conscious thought and intellectual effort to evaluate information and integrate it with previous knowledge (Leberman, *et al.* 2006: 5; Kraiger 2003: 201). Mindful transfer occurs in situations where there are significant gaps or differences between the original and the transfer situation.

2.5   SOURCES OFTRANSFER PROBLEMS

Broad & Newstrom (1992) derive transfer problems from the perspectives of three key members of Transfer Partnership. Transfer Partnership is made up of managers, trainers, and trainees who have a strong interest in a particular training program and who have agreed to work together to support the full application of the training to the job (Broad & Newstrom, 1992: 14).

Trainees are the learners (educators). They are usually employees whose training, education and development are sponsored by the organization (DoE) to improve

organizational functioning and productivity (performance in case of schools). The trainee recognises the need for new skills.

Trainers include all HRD- related professionals; they may be internal consultants (subject advisors in case of DoE); employees in the organization (for example School-based Subject Specialist) or external consultants who assist organizations (schools) on a temporary basis. The trainer manages the design and/or delivery of learning experiences.

Managers include all in the organization (DoE and schools respectively) with authority and responsibility for accomplishing an objective or mission through the efforts of others, from the Minister of Education to the first line supervisor and team or group leader. The manager support learning and application on the job.

The training program that the Transfer Partnership supports may be short (a day or less) or long (a series of events stretching over months or years). The training may be in the classroom, individualized, or embedded in the work itself. Managers may serve in the trainer role for some or all of the training. The only true requirement for a Transfer Partnership is for all partners to be committed to making the training investment pay-off.

Each partner has an important contribution, and full transfer requires that all partners cooperate to maximize the application of new knowledge and skills to the job. Together their partnership in planning and implementing transfer strategies, before, during, and after training, will bring a highly leveraged pay-off of enhanced transfer of all the organization's training efforts.

For transfer to occur, individuals must participate in the learning event, learn something as a result of the event, and then use that learning on the job. The goal is to overcome hurdles along the way and apply newly acquired knowledge and skills to meet job requirement, thereby achieving transfer. However, prior to a learning event an individual may choose not to participate, or may reluctantly agree to participate in the learning event. Similar hurdles exist during the learning events and after the learning events. Any

of these hurdles may eliminate or diminish the likelihood of transfer. Holton III & Baldwin (2003: 167) have depicted these hurdles (Figure 1):

Figure 1: Hurdles to Transfer (Holton III & Baldwin, 2003: 16)

TRANSFER

After Learning Events
• Learning occurred, but not motivated to apply learning on the job
• Learning occurred, but job environment doesn't allow application
• Leaning occurred, but forgot learning before able to apply them on the job

During Learning Event
• Agrees to participate, but learns things that won't help on the job
• Agrees to participate, but the event doesn't stimulate learning

Prior to Learning Event
• Won't participate in the learning experience
• Agrees to participate, but reluctantly

LACK OF TRANSFER

2.6   IMPEDIMENTS TO TRANSFER OF TRANING

Many factors can inhibit transfer of training, and include the following: characteristics of the learning event, attributes of the learner, motivational factors, and characteristics of the work environment can all create obstacles at each stage of the learning process

Transfer of training occurs when employees use acquired knowledge and skills to perform their jobs effectively and to enhance organizational effectiveness. Inherent in this definition is the realization that there are obstacles to the successful application of newly acquired knowledge and skills. Phillips and Broad (1997: 25) identify factors that affect transfer of learning to the workplace such as management actions and barriers to transfer. Management actions support transfer but research has confirmed that there is a lack of demonstrated support by managers in many organizations.

Phillips & Broad (1997: 9) have developed categories of trainee and work characteristics which may inhibit transfer of training. They have ranked ordered the nine categories of barriers according to their perception of relative influence against transfer as follows:

Table 1: Trainee and environment characteristics which may inhibit transfer of training (Phillips & Broad, 1997: 9)

_____

Rank order	Barriers
1	Lack of reinforcement on the job
2	Interference from immediate work environment
3	Non-supportive organizational culture
4	Trainees' perception of impractical training programs
5	Trainees' perception of irrelevant training content
6	Trainees' discomfort with change and associated effort
7	Separation from inspiration or support of the trainer
8	Trainees' perception of poorly design/delivered training
9	Pressure from peers to resist change

Key: 1 = greatest barrier   9 = lowest barrier

Phillips & Broad (1997:10) surveyed a variety of organizations, and identified four factors that inhibit efforts to transfer training to the workplace include:

- Lack of to management involvement in the training and development
- Impetus for change only from top executive levels, with little buy-in by level managers
- Self-centred behavioural change efforts, with little management involvement
- Unrealistic, unreachable change goals for training and development.

The common thread in the four factors is the lack of collaboration efforts among the stakeholders on behavioural change. However, Phillips & Broad (1997:11) have identified characteristics of trainees and work environments that affect transfer of training. Trainees' abilities, aptitude, personality (need for success and internal locus of control) and motivation support of transfer of training. But, in order for transfer to occur, trainees need a supportive work environment with preliminary discussions with supervisors, who can assist in creating opportunities to use new learning and give feedback following training (Khoza, 2006:45).

Some of the common obstacles of transfer of training may be presented as follows:

Table 2: Transfer of Training Obstacles (Holton III & Baldwin, 2003: 168)

Trainee Attributes	The training
- External locus of control - Low self-efficacy - Low need for achievement - Low ability or aptitude	- Lack of perceived relevance to work - Poor trainer capabilities - Lack of feedback - Other poor instructional design issues
Motivational Factors	**Post-training Environment**
- Lack of job identification - Lack of organizational commitment - Lack of choice to participate - Low perceived instrumentality or value	- Weak continuous learning culture - Lack of follow-up, encouragement, or feedback - Time lag - Situational constraints

In general, according to Tziner, Fisher, Senior & Weisberg (2007); Elangovan and Karakowsky (1999); Colquitt, LePine and Noe (2000); Taylor, 2000:5 and Nunes (2003) obstacles stem from three sources: trainee characteristics, work environmental factor, and training design and delivery factors.

2.6.1 TRAINEE CHARACTERISTCS

Several factors may influence whether a trainee is motivated to attend training, actively participates and learns during training, and applies training in the workplace. According to Elangovan and Karakowsky (1999:269) the role of the trainee in affecting the transfer of training has received relatively little research attention, although the trainee lies as the centre of the transfer process. Elangovan and Karakowsky contend that this condition exists despite the importance placed on the role of the individual in areas such as motivation, leadership, and decision making for understanding and predicting behaviour.

The trainee-related factors that affect the transfer of training process can be classified into three categories: Ability-related factors; motivation-related factors; and personality-related factors.

2.6.1.1 Ability-related factors

Low ability or aptitude: Ability or aptitude can influence employees' success on new tasks. Abilities are generally regarded as relatively enduring attributes of individuals related to the performance of a set of tasks (Nunes 2003:14). Individuals with low ability or aptitude in the area to be trained may be less likely to be successful in training (Holton III and Baldwin, 2003:169). General intelligence can also impact many facets of the job from training to actual job performance. Research has shown that individuals with lower general intelligence tend to perform more poorly in training (Holton III and Baldwin, 2003:169).

Low knowledge acquisition: Ability to transfer training is positively related to the level of knowledge acquisition from the training. Elangovan and Karakowsky (1999:271) contend that employees who learn and retain the skills and knowledge offered by the training program are better prepared and able to transfer training than those whose knowledge acquisition during training is low. This clearly emphasise that trainees must first acquire the relevant skills before they can be generalized and maintained on the job. Besides skill development, trainees should have more information and knowledge about where and how the training can be used. Thus, knowledge gains from training have a positive impact on ability to transfer, which in turn have a positive effect on transfer of training.

Knowledge acquisition during training is affected by various factors such as training methods, trainee ability, trainee motivation to learn, training biases, and training history (Elangovan and Karakowsky, 1999:271). For example, if an employee had consistently used skills and techniques learned from earlier training programs, he/she is likely to have problems adopting to or learning distinctly new skills and methods of performing. This is especially true if the employee had formed scripts and schema concerning work behaviour (Elangovan and Karakowsky, 1999:271). This would adversely affect new knowledge acquisition, which would then lower effective transfer of training.

Lack of situation identification: An important aspect of the transfer of training is generalization and application of the training to the actual job. This requires the identification or recognition of situations where the newly learned skills are relevant and useful, and can be applied for performance improvement. Therefore, the ability of the trainee to identify appropriate situations for the application of learned skills is an essential element of successful transfer of training. Employees who are adept at identifying situations or conditions where they can effectively use their training will effectively transfer this training. Further, the ability to identify situation improves with practice and frequency of use (Elangovan and Karakowsky, 1999:271).

2.6.1.2 Motivation-related factors

It is widely accepted that learning and consequently, transfer will occur only when trainees have both the ability ("can do") and motivation ("will do") to acquire and apply new skills. Nunes (2003:16) indicates that even if trainees possess the prerequisite skills needed to learn the training program content, performance in the program will be poor if motivation is low or absent.

Motivation can be defined as variability in behaviour not attributable to stable individual differences (e.g. cognitive ability) or strong situational coercion (Nunes, 2003:16). Thus, motivation involves a choice by individual to expend energy toward one particular set of behaviours over another. Elangovan and Karakowsky (1999:269) define motivation to transfer as the trainee's desire to use the knowledge and skills mastered in the training and development program on the job. Below are some of the identified motivation-related obstacles to transfer of training:

Low perceived relevance of training: The perceived relevance or importance of the training programs significantly affects the motivation to transfer training. Trainees who value the training are relatively more likely to effectively transfer the training than those who are not (Colquitt, *et al*. 2000:679; and Elangovan & Karakowsky, 1999:269). Perceived importance of training affects not only the motivation to learn but also the motivation to apply the newly acquired knowledge and skills. An employee who considers the training irrelevant to the actual job performance will devote less time and effort in learning and applying the new skills compared to an employee who perceives value in the new skills. Therefore, low perceived importance of training would lead to less effective transfer of training.

Lack of choice in attending training: Sometimes, employees are told to attend training to correct some deficiency. In these instances, training may be viewed as a

punishment. In other cases, employees may have greater discretion about which training they attend. According to Elangovan and Karakowsky (1999:270) employees offered a choice of entering a training program may develop a greater appreciation for this training than those "forced" into a program regardless of their personal interest. Consequently, the motivation to learn will be higher when employees have a choice in attending training.

Lack of expectancies and valence of training: Vroom's expectancy theory of 1964, suggests that individuals (trainees) have preferences among the different outcomes that can result from participation in various activities (i.e. valence) such as training (Nunes, 2003:27). Trainees also have expectations regarding the likelihood that effort invested in training will result in mastery of training content (i.e. expectancy). According to Elangovan and Karakowsky (1999:270) Trainees may or may not perceive a "connection" between improved performance (resulting from using their skills and knowledge acquired from training) and rewards (e.g. wage increases, bonuses, promotions, status rewards). The perception of a clear link between training-based improved performance and rewards implies high outcome expectancies which, in turn, suggests high motivation to transfer (Nunes, 2003:16; Elangovan and Karakowsky, 1999:270 and Holton III and Baldwin, 2003:170)

Low self efficacy: This attribute is defined as the individual's belief that he/she can successfully meet training requirements and master training-program contents (Tziner, et. al. 2007:167; Holton III and Baldwin, 2003:170 Holladay & Quinones, 2003:1094 and Colquitt, et. al. 2000: 679). The low level of self-efficacy negatively affects task effort, persistence, expressed interest and the level of goal difficulty (Elangovan and Karakowsky, 1999:270) and has important implications for the facilitation of effective transfer of training. Trainees who lack sufficient self-efficacy will expand less effort in transferring training (Colquitt, et. al. 2000:680 and Holton III and Baldwin, 2003:169). In sum, employees with lower perceived self-efficacy in applying their newly learned skills and knowledge are more likely not to transfer training than those with higher perceived self-efficacy.

Lack of job involvement: The degree to which employees are involved in their jobs will affect the transfer of training to the workplace. According to Elangovan and Karakowsky (1999:270) job involvement refers to the degree to which an individual identifies psychologically with the job and considers his/her perceived performance level important to self-worth. In general, employees high on job involvement are more concerned about their jobs and their own performance, and are constantly seeking ways to improve their effectiveness. One way to improve performance is to effectively transfer the skills and knowledge acquired during training to the actual job (Nunes, 2003:36).

Low need for achievement: Need for achievement is demonstrated in employees who treat work seriously, perform actively, and have a high ambition to succeed (Holton III & Baldwin, 2003:169). Individuals with a low need for achievement may be less likely to view training as an opportunity to build their own skills and be more successful. This leads to decreased motivation to learn and apply new learning to the job.

2.6.1.3   Personality-related factors

Personality refers to the relatively stable characteristics of individuals (other than ability) that influence their cognition and behaviour (Colquitt, el al. 2000:679). Behaviour in many situations is the result of both an individual's personality and the characteristics of the environment. Personality as a construct is found in many motivation theories because it creates differences in self-set goals and the cognitive construction of individuals' environments, both of which go on to create between-person differences in behaviour (Colquitt, el al. 2000:679 and Nunes, 2003:28).The following personality variables may influence whether a trainee is motivated to attend training, actively participates and learn during training, and applies the training in the workplace:

Locus of control: Locus of control is a generalised expectancy that organizational outcomes are controlled either by an individual's own actions (internal) or by other forces (external) (Holton III & Baldwin, 2003:169; Nunes, 2003:30). It is likely that

certain personality characteristics may lead two trainees to view the same transfer environment as more or less supportive. These characteristics may impact on trainees' ability and willingness to change or to ignore no-supportive aspects of their transfer environment. For example, individuals with an external locus of control can have lower motivation to attend training and may be less likely to apply new knowledge or skills on the job (Colquitt, el al. 2000: 679).

Conscientiousness: Conscientious individuals are dependable, organized, persevering, thorough, and achievement oriented (Tziner, *et al*. 2007:168; Kraiger, 2002: 62). Martocchio & Judge (1997:764) showed that conscientious individuals had more confidence in their ability to learn the training materials. Similarly, Coliquitt & Simmering (1998: 655) showed that conscientious learners had higher self-efficacy and a stronger desire to learn the training content. Although this suggests that training outcomes may be best with conscientious trainees, research has also shown conscientiousness to be negatively related to some cognitive outcomes (for example, skill acquisition) (Colquitt, *et al*. 2000: 679; Martocchio & Judge, 1997:765). Conscientious individuals may have a tendency to be self-deceptive about learning progress. Such individuals also have a tendency to stay committed to courses of action that become improper because of situation changes (LePine, Colquitt, & Erez, 2000:568; Hochwarter, Witt & Kacmar, 2000:764).

Goal Orientation: Goal Orientation may be considered the individual's mental framework, which influences interpretation and behaviour in learning activities. According to Kraiger (2002: 63) and Tziner, *et al*. (2007:168), individuals have either a mastery goal orientation or a performance goal orientation. Individuals with a mastery orientation seek to gain competence through mastery of new skills or experiences. Those with a performance orientation seek to demonstrate competence by receiving positive evaluations from others (Tziner, *et al*. 2007:168). Persons with a mastery orientation will make a greater effort in the learning process, whereas persons with a performance orientation are likely to focus on testing well, regardless of whether they actually learn or not. A person with a mastery orientation is likely to be problemd by

errors and negative feedback during learning; those with a performance orientation are likely to become frustrated by this. Research has shown that individuals with a mastery orientation were more motivated to learn, and learned more, than persons with a performance orientation (Colquitt & Simmering, 1998:655; Fisher & Ford, 1998:402; Phillips & Gully, 1997:793).

Anxiety: Anxiety is an acquired or learned fear that can result in physical arousal and a disruption in cognitive functioning and performance (Kraiger, 2002:63). Although anxiety is often cued by characteristics of the instructional environment, certain individuals have a predisposition to reacting anxiously in learning contexts. This can be damaging in a training environment because it can lead to off-task attention or cognitive disengagement. It can also exacerbate the effects of initial struggles, which are common when learning any new skill. Anxiety has therefore been shown to have a negative relationship with training motivation and learning (Colquitt, et al. 2000:679; Kraiger, 2002:63).

2.6.2. ENVIRONMENTAL FACTORS

The work environment can influence learning and transfer in several different ways. Behaviours and attitudes are influenced by the work employees do, relationships at work, and the overall psychological culture or climate of the organisation. According to Elangovan & Karakowsky (1999:271) and Colquitt et al.(2000:680) environmental factors refer to various aspects in the employee's work environment which either facilitate or impede effective transfer of training. Similarly, according to Gitonga (2006:988) the work environment generally includes climate factors such as supervisory or peer support as well as constraints and opportunities to perform learned behaviour on the job. Despite recognition of the importance of environmental factors, empirical research examining the impact of these factors is very limited (Tracey, Tannenbaum & Kavanagh, 1995:239). It is imperative that we critically examine the various factors and ways in which the workplace environment affects the transfer of training process in

order to enhance our understanding of the problems underlying transfer of training effectiveness.

According to Elangovan & Karakowsky (1999: 271), the environmental factors that potentially affect the transfer of training process can be broadly classified into two categories – job-related and organisation-related.

2.6.2.1   Job-related environmental factors

Job-related environmental factors refer to those that pertain to the specific job and its setting, i.e. they vary from job to job within the same organisation. They are:

Job requirements: The job demands or requirement plays a major role in determining the effectiveness of transfer of training. According to Elangovan & Karakowsky (1999: 272) an employee who has undergone training can transfer his/her newly acquired skills and knowledge only if the job presents opportunities for their application. In other words, if the scope of the job is relatively narrow, it will restrict any transfer of newly trained skills. For example, an organisation which sponsors an employee's admission to a management program (e.g. an MBA degree) should ensure the employee is either given new responsibilities and autonomy in the current job or moved to a different job that allows him/her to exercise the new skills. Therefore, it is important to ensure that the job itself does not act as an impediment to the effective transfer of training. Otherwise, the training provided to the employee will be inconsistent with the "stagnant" nature of the current job demands, leading to poor transfer (Elangovan & Karakowsky, 1999: 272; Nunes, 2003: 46)

Group norms and group pressure: Group norms and pressure have a strong effect on group performance. According to Elangovan & Karakowsky (1999: 272), conformation to group standards and norms will affect productivity and performance of the individuals. For example, a highly motivated and able employee may, nonetheless, lower his/her daily productivity if conformity with group norms dictates low standards of productivity. In a transfer context, this implies that training for improvement and higher

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productivity will be ineffective if the trainees conform to group norms which discourage the transfer of learned skills (improvements in productivity) to the job (Nunes, 2003: 46).

Contextual similarity: Another factor that influences transfer of training is the difference between the training context and the transfer context. According to Elangovan & Karakowsky (1999: 272), the difference between the contexts implies that the newly trained employee would face an unfamiliar environment. Consequently, the training will be perceived as inapplicable or inappropriate. Similarly, skills learned within the confines of a "classroom" may not necessarily facilitate effective transfer of training to the actual job site. Effective transfer of training is contingent on similarities between the training context and the actual job context (Nunes, 2003: 41; Kraiger, 2002: 276). The difference between the training context and the "applied" context will significantly restrict the effective transfer of trained skills. Therefore, it is important that training programs attempt to match the training context as closely as possible to the "applied" setting in order to induce effective transfer of training (Elangovan & Karakowsky, 1999: 272; Haskell, 2001: 80).

Supervisory support: The perception of the supervisory support is determined by the activities the supervisor performs before, during and after the training program. Supervisory support offered to the trainee takes the form of encouragement to use newly learned skills, assistance in identifying situations where the skills can be used, guidance in the proper application of the trained skills, provision of feedback, positively reinforcing new applications and improvements, etc., all of which facilitate positive transfer of training (Elangovan & Karakowsky, 1999: 272; Taylor, 2000: 6; Holton III & Baldwin, 2003: 243). An employee who receives support and encouragement from the supervisor will be highly motivated to apply the newly learned skills (Elangovan & Karakowsky, 1999: 272). In addition, supervisory guidance, along with sufficient practice, will improve the ability to transfer, and positively affect the transfer process. Supervisory support also positively affects the trainee's attitude towards the training, which in turn has a direct effect on transfer of training (Kraiger, 2002: 72; Colquitt, *et al*. 2000: 681).

2.6.2.2 Organisational-related environmental factors

Organisational-related environmental factors relate to the entire organization. They are:

Reward system: The organisation's reward systems have a major effect on the transfer of training. According to Elangovan & Karakowsky (1999: 273), when organisations explicitly recognise and rewards the application of newly acquired skills and knowledge, employees will be motivated to effectively transfer these skills. Using an expectancy theory framework providing valued rewards for effective transfer of training implies a high score for both instrumentality and valence. Consequently, this positively affects the overall VIE score (motivation) for applying the newly learned skills. In sum, reward systems that provide valued outcomes for effective application and performance improvement facilitate positive transfer of training.

Organisational climate: Organisational climate refers to the shared pattern of meanings among organisational members about specific and salient organisational elements (Tracy, Tannenbaum, & Kavanagh, 1995: 242; Kraiger, 2002: 68). Climate for transfer refers to the trainee's perceptions of characteristics of the work environment that influence the use of what they have learned (Kraiger, 2002: 69; Tracy, *et al.*1995: 240), such as manager and peer support for training and development programs, adequate resources, performance appraisal systems that account for behaviour and skills acquired in formal training programs, and positive consequences for using the training content. It reflects the pattern of shared meaning associated with formal training programs offered by the organisation. Therefore, transfer of training climate refers to perceptions about characteristics of the work environment that facilitate or inhibit the use of trained skills and behaviours. It reflects the pattern of shared meaning associated with formal training programs offered by the organisation. Research clearly demonstrates that the climate for transfer does influence motivation to learn as well as knowledge and skill acquisition and transfer of learning (Colquitt, *et al.* 2000: 681; Tracy *et al.* 1995: 240).

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Organisational culture: Organisational culture refers to the shared pattern of meaning about a comprehensive set of organisational elements (Tracy, *et al.* 1995: 242). That is, cultural assumptions, values, beliefs, expectations, and behaviours are based on the interactions among a diverse set of organisational characteristics. If employees believe the organisation does not value training, then motivation to attend and subsequent transfer of training will suffer (Holton III & Baldwin, 2003: 171). An organisational culture that fosters employee development and growth, favours constant improvement and progress, and encourages employee initiative will have a positive impact on transfer of training (Elangovan & Karakowsky, 1999: 273).

Organisational Justice: According to Kraiger (2002: 69), organisational justice refers to the perceived fairness of decision making in organisation. Employees perceive that there is organisation justice when they are given choices and allowed input into decisions; when they are treated consistently, politely, and without bias; and when they are provided with extensive explanations (Kraiger, 2002: 69). Organisational justice is particularly relevant to the assignment of trainees to training situations. For example, research shows that trainees react more favourably when they choose to attend training, rather than being assigned to do so, and when they have some input into the training content (Kraiger, 2002: 69). Justice is also particularly relevant when trainees are assigned to remedial or basic skills training. Quinones (1995: 228) showed that trainees who perceived that remedial assignment decision have been made in a fair manner performed better during training.

2.6.3 TRAINING DESIGN AND DELIVERY

Beyond trainee attributes, environmental factors and motivational issues, the training itself may influence whether a trainee is motivated to attend training, learns from the training, and applies the new learning to the workplace. Some of the more common training obstacle, according to Holton III and Baldwin (2002:170) include lack of

perceived relevance to work, poor trainer capabilities, lack of feedback, and other instructional design limitations.

- **Lack of relevance to work**. Training should be relevant to the actual work performed by the individual. If the training is not perceived as relevant to the employee's work, the trainee will be less likely to apply the training on the job.

- **Poor trainer capabilities**. An ineffective trainer will inhibit trainee understanding and subsequent learning material. This may lead to an inability to apply learning in the workplace.

- **Lack of feedback**. Feedback (or knowledge of the results) occurs when information is provided to individuals about their performance. Improper use of feedback during training inhibits learning and subsequent use of the material.

- **Other instructional design limitations**. Poor instructional design may inhibit individual understanding and subsequent learning of the material. This lead to an inability to apply learning in the workplace. For instance, lack of similarity between the training environment and actual work requirements can inhibit learning and subsequent transfer (Holton III and Baldwin, 2002:170)

Training is an important aspect of an individual's career development and growth. It is also an expensive, if vital, component of businesses and government (Phillips & Broad, 1997: 109). In an era of downsizing and budget reductions, the trainers must examine the effectiveness of training and improve its payoff to the organization it supports. Trainers cannot leave to chance the transfer to the workplace of their students' skills and knowledge; they must build strategies aimed at encouraging transfer into their course design.

Failure by the trainers to invest substantial effort in planning a course is another factor that inhibits transfer of training (Phillips & Broad, 1997: 2). The upfront effort of trainers to plan for the courses is essential to the success of their work. The more they learn about a training problem in advance, the better that trainers can target the instruction to address that need, reduce the risk of the unknown in the classroom, and help learners master the new skills (Phillips & Broad, 1997: 2)

The framework for analyzing a training problem, defining the intended outcomes, determining how to present the content to the learners to achieve those outcomes, developing the training course according to the designs, implementing the course, and evaluating its effectiveness is called *instructional design process* (Phillips & Broad, 1997: 2). Trainers use instructional design to prepare all types of instruction – course presentation in the classroom, through workbooks, and online.

According to Phillips & Broad (1997: 2), the true purpose of design is problem solving. They argue that good instruction addresses problems because education results in a change of behaviour. Sometime that change affects physical behaviour (called *psychomotor skills*); sometime that change affects intellectual behaviour (called *cognitive skills*) and sometime that change in behaviour affects attitudes (called *affective skills*)(Fisher & Ford, 1998: 401 and Carliner, 2003:2). Therefore, one of the key elements of the design process is determining which behaviours need to be changed, the skills and knowledge that learners must develop to master the desired behaviour, and the motivators that would encourage or discourage learners from adopting those behaviours on the job. According to Carliner (2003:2) design is guided by certain general principles, which are:

- o The principle that constitute the field of human performance improvement, which help to ensure that people achieve the best possible results on the job
- o The principle that underpin adult learning.

2.6.4 PRINCIPLES OF LEARNING

A large portion of the empirical research on transfer has concentrated on improving the design of training programs through the incorporation of learning principles (Schank, 2000:206; Goldstein & Ford, 2002:129; Kraiger, 2002:276; and Haskel, 2001:80). Research has focused on four basic principles: (1) identical elements, (2) teaching of general principles, (3) stimulus variability, and (4) various conditions of practice.

Identical elements: Identical elements refer to the use of identical stimulus-response elements in both the training and transfer environment (Schank, 2000:206 and Kraiger, 2002:276). By using the identical elements approach, trainees are taught, in the training context, all the important dimensions of their job assignment. According to Schank, (2000:206) and Kraiger, (2002:276) a clear and known relation must exist between the original and transfer tasks and students must recognise the existing identical elements for transfer to occur. Empirical research supports the use of identical elements as a means of increasing the retention of both motor and verbal behaviours (Kraiger, 2002:276)

General Principles: Teaching with general principles maintain that trainers focus on the development and presentation of general rules, guidelines and principles that underlie the training content and that might be appropriate to all situations, without regard to the job environment. According to Kraiger, (2002:277) the teaching of general principles is an example of a "high-road" approach to transfer, that focuses on assisting learners to develop abstract schemas that can be applied across a number of different types of situations. Trainees are then expected to return to their jobs and identify opportunities for the application and adopt the principle to the task (Nunes, 2003:42). Teaching through general principles thus enhances trainees' lateral thinking ability and consequently increases the probability of transfer.

Stimulus variability: This refers to the variety of training techniques used during the training session, for example the use of videos, simulation, role modelling and lectures. The use of variety of training techniques enhances the effectiveness of the program (Haskell, 2001: 81; Heystek, Nieman, Van Rooyen, Mosoge, & Bipath, 2008:178). Kraiger (2002:278) adds that using a variety of examples during training to illustrate a principle may help trainees develop an understanding of general rules that may be transferred to other situation. Trainees do this by learning to recognize the common features of the examples. There is the need for the trainees to differentiate between the structural and surface components of situations. Kraiger (2002:278) contend that

although the surface components may be varied to help trainees develop general rules, the structural components need to be consistent for transfer of learning to occur.

Conditions of practice: Conditions of practice include a number of specific design issues including massed or distributed training, whole or part training, feedback and over-learning (Kraiger, 2002:279; Heystek, *et al.* 2008:178). *Massed vs. distributed training* is the issue of whether or not to divide training into segments. *Whole vs. part training* concerns the relative efficiency of practice with all the material as opposed to practice on one part at a time. The whole method is advantageous for enhancing training outcomes when the intelligence of the learner is high; practice is distributed rather than massed; and the training material is high in task organisation but low in task complexity (Nunes, 2003:42). *Feedback, or knowledge of results*, refers to information provided to trainees about their performance. Feedback is a critical element in achieving learning and timing and specificity are critical variables in determining its effect. *Over-learning* refers to the process of providing trainees with continued practice far beyond the point when the task has been performed successfully (Kraiger, 2002:279). Researchers indicate that the greater the amount of over-learning the greater the subsequent retention of the trained material (Haskell, 2001: 81; Heystek, *et al.* 2008:178).

2.6.5 THE PRINCIPLES OF ADULT LEARNING

When designing and presenting training course, trainers must treat adult learners (educators) like adults. According to Galbraith & Fouch (2007:35) and Phillips & Broad (1997: 5), adults approach learning differently than children do. Adults enter training with experience, with preconceived notions of the subject, and with other needs. Therefore, adult learning must begin with a basic understanding of ways that adults learn. Often trainers know the content to be presented, yet they may be unaware of the most effective methods to deliver the information (Galbraith & Fouch, 2007:35).

Andragogy and pedagogy refer to the study of teaching, with *andra* meaning *man, adult* and *peda* meaning *child* (Galbraith & Fouch, 2007:35; Carliner, 2000:5). Thus, andragogic learning designs involve features which recognise the essential maturity of the learner; they are problem-centred rather than content-centred; they encourage the learner to introduce past experiences into the processes in order to re-examine that experience in the light of new data; the climate of the learning process must be collaborative as opposed to authority-oriented; planning and evaluation are mutual activities between learner and instructor; evaluation lead to reappraisal of needs and interest and activities are experiential, not "transmittal and absorption" as in standard pedagogy (Galbraith & Fouch, 2007:35).

The following are series of characteristics of adult learners identified by Galbraith & Fouch (2007:36); Kennedy (2003:2); Carliner (2003:5) and Phillips & Broad (1997:5):

- o **Autonomous and self-directed**. Trainers should involve respondents in the learning process and serve as facilitators, not educators. Andragogy encompasses principles that instructional designers must address when preparing learning programs for adults.

- o **Accumulation of life experience**. Adult experiences should be incorporated into the learning to provide a base of connectivity and relevance. In some instances, however, content in the training program contradicts material that people previously learned. In such situations, designers of training programs must first convince learners to part with old approach so they can grasp the new.

- o **Goal-oriented**. Adults primarily participate in learning programs to achieve a particular goal. The goal may be work related or personal. Therefore, the trainer must structure training with defined elements that are consistent with the learners' goals.

o **Relevancy-oriented/immediacy**. The trainer should set objectives immediately so that learners can relate to the concept and understand the reasoning behind the objectives, then can apply them in their own lives.

o **Practical.** The trainer should focus on the "what" and the "why" so that adults will apply the lessons that are most useful in their environment.

o **Pressed for time**. Adults squeeze in learning between demanding jobs, family responsibilities, and community commitments. Even when highly motivated to learn, the call of life limits the time that many adults can invest in learning.

o **Adult learners have different motivation levels**. During the first six weeks to three months on a job, adults are highly motivated to learn. When faced with a new work process or approach, adults are similarly motivated to learn. (What stifles their motivation, at this point, is fear of failure and difficulty of unlearning old habits.) As they become more familiar with the content, learners' motivation to learn wanes until a specific need arises. The problem to the designers of training programs is identifying the motivation level of learners as their expertise grows, and matching content to that level of motivation.

o **Adult learners have different learning styles**. Learning style refers to the way in which a person prefers to pick up new content. Each person has a number of preferred learning styles. In an ideal world, each learning program would be able to accommodate the different learning styles of all the learners. Learners would more likely to master the content because they learn in their preferred style. Practical reality requires that course designers would have to design and develop separate versions of each training program to accommodate each learning style. Because that's not usually feasible, designers try to account for the variety of learning styles by using many different strategies to present content throughout a training program.

2.6.6 Delivery of training

Designers of training programs, whether on-the-job or off-the-job, should take heed of factors that may hamper delivery of training. Some authors (Nunes, 2003:41; Heystek *et al*, 2008:178; Haskell, 2001:80; Kraiger, 2002:276; Poulet, 1997:434) mention the following factors that may hamper delivery of training:

2.6.6.1   Sequencing

Sequencing is the process by which the content and the learning experiences are placed in the configuration that will produce the most learning in the shortest possible time (Nunes, 2003:43). The sequencing of learning material is a vital aspect of training design since it has a significant impact on the effectiveness of the learning situation. Yet, it is often neglected by trainers and instructional designers. The result is that the trainee often suffers, that meaningful learning does not take place and consequently adequate transfer does not occur.

2.6.6.2   Training Content

The course content may be too theoretical or not practical enough. It may also be perceived to be in conflict with values of the organisation, or may be presented out of sync with on- the- job requirements and perceived to be irrelevant (Nunes, 2003:43). This may confuse trainees and consequently, have a negative impact on their intention to transfer.

2.6.6.3 Trainer credibility

A low level of trainer credibility can be an inhibiting factor, since this may negatively affect trainees' attitudes and motivation to learn and apply the training material on the job

2.6.6.4 Training media

The types of audiovisual materials used are strongly influenced by the type of task to be trained. Usually, a mixture of different types of media is most effective. Nunes, (2003:44) proposes that the wise selection and the proper use of variety of audio visual materials can fill the gap between verbalisation and real- life, direct experience.

2.6.6.5   Training Methods

The appropriateness of training methods will be strongly influenced by the nature of the task to be trained and most tasks require a mixture of methods. Inappropriate methods lead to ineffective learning, which consequently results in insufficient transfer (Nunes, 2003:44).

2.6.6.6   Delivery Style

It is important for the trainer to capture and hold the attention of the trainees. The trainer's delivery style is thus an important factor influencing training effectiveness (Nunes, 2003: 44). Trainees may perceive training to be poorly designed and delivered, thus reducing their motivation to learn and apply the training on the job (Broad & Newstrom, 1992:18).

2.6.6.7   Reputation of the Training Programme

The reputation of the training programme may affect a trainee's motivation. There is a positive relationship between training reputation and training motivation. Consequently, if the training program has a reputation of being a waste of time or of being of little use to employees, the trainees' training motivation will be low, thus negatively affecting trainees' intention of transfer (Heystek *et al*. 2008:178)

The above factors influence trainees' motivation to learn, learning, the intention to transfer, and consequently, the degree of transfer that takes place on the job. It is therefore imperative that they should not be ignored. A training program that is well designed and delivered has a positive impact on training effectiveness, since it lays the foundation for transfer of training to take place in the workplace. The focus will now shift towards factors in the work environment that may influence the eventual transfer of skills to the workplace. This is a problem to the SMTs because they do not have any control over the content of the training program, the training design and delivery of the training content. The SMT has the responsibility to ensure that transfer of training which, they themselves do not know, is taking place.

2.7   DEALING WITH PROBLEMS OF TRANSFER

The local and international world of work, including schools, has become a dynamic, tumultuous and technologically advancing arena (Govender and Bisschoff, 2007:54).This rapid change in the workplace tools, techniques, products and processes, pose a continuous problem to the SMTs, educators and the trainers. Human resource must be developed regularly to keep pace with the knowledge and competencies of evolving job description. All the three key members of Transfer Partnership (state at 2.5.1) are faced with the problem of making education, training and skill development of educators a priority and to ensure that transfer of training is taking place.

2.7.1 The role of the trainees

The most important role of trainees is that they must participate in the learning event, learn something as a result of the event, and then use that learning on the job (Holton III & Baldwin, 2002:166). Educators must take responsibility of their own development by opting to attend training that is relevant to their work. They must also understand that they are expected to report back to their managers and colleagues what was learned.

2.7.2 The role of the trainers

According to the South African Qualification Authority (SAQA), a training provider is defined as a body that delivers learning programmes that culminate in specified National Qualification Framework (NQF) standards or qualifications and manages the assessment thereof (SA, SAQA, 2000:28). Training providers are individuals, organizations or consultants who provide internal and/or external training to the workplace (Govender and Bisschoff, 2007:54). Internal training providers in a school situation are HOD, Senior Educator, Principal or even an educator who transfer their skills, knowledge and values to other educators within their school via formal or informal training. External training providers are the specialist trainers, for example, Subject Advisors, officials from HR and NGOs brought from outside the school situation into the school to build capacity and transfer skills to employees.

Training providers must provide and deliver continuous, high quality, accelerated skills development to maintain a quality, performance orientated, lifelong learning workforce (Govender and Bisschoff, 2007:54). They must align their policies with the legislative policy and procedural criteria that underpin the management of workplace skills development; implement processes and training delivery tasks that must be monitored, managed, and controlled; and utilise an effective management framework to manage the overall system for executing the operational tasks successfully and in accordance with national legislation. Trainers are required to deliver nationally accredited learning programmes so that learners are motivated to gain new skills and competencies relevant to their job (SA, SAQA, 2000:28).

Trainers should use various transfer strategies to manage support for training. The following are tips to the trainers from Machles (2002:33) for increasing training transfer:
- Use realistic examples of how the skill might be used.
- Give learners meaningful contexts for the application of concepts rather than presenting theory without useful association.
- Use rich analogies to heighten retention of information.

- Present skills in a conceptual context before asking learners to use them.
- Include practice of skills in the design of the learning event.
- Present new concepts in several different ways.
- Use clear and effective visual aids.
- Consider the use of pre-training assignment.
- Keep concepts and skills as close as possible to the work generally performed by respondents.
- Build in post-training follow up with respondents.
- Encourage the organisation to develop supportive environment for continued learning in the workplace after training has taken place.

Trainers are faced with problem of ensuring that what has been learned in training is transferred to the work situation. According to Kraiger (2002:295) trainers have little control over what happens after training and whether trainees will be rewarded for implementing the skills they have learned. Trainers have also no control of selecting educators who are supposed to attend training. Another problem according to Kraiger, is that trainers struggle to assess to which extend does training develops in trainees adaptive expertise, because the core attributes (a detailed, well-organised knowledge structure and metacognitive skills) are difficult to measure.

The organisational climate for transfer of training has been shown to have strong impact on training and transfer. Trainers have a little control over the work condition of their trainees, that is, they do not have control over whether the trainee is given opportunity to perform the learned skills; the support and encouragement from supervisors and co-workers as well as resources in the workplace.

2.7.3 The role of the School Management Team (SMT)

Managers hold the most significant key to resolving the problem of transfer of training. According to Ford, Quinones, Sego & Sorra (1992: 514) the SMT especially the HOD should provide initial training to newly appointed education prior to be assigned to a

particular department or area within the organisation. The SMT should provide more opportunities for the trainees to perform trained tasks to the work. They should create conducive environment in the school that will allow the trainees to practice what they have learned in training. SMT should create a strong organisational culture specifically for supporting training and its application in the workplace.

The SMT is faced with the problem of ensuring that learned skills, knowledge and attitudes learned in training are practised on the job. According to Machles (2002: 32) inconsistencies in the workplace; lack of technology or equipment to support training and co-workers attitudes and behaviours that do not support training create problems to SMTs in ensuring that transfer of training is taking place.

Lack of management commitment and involvement in training of the educators is inhibiting transfer of training (Machles, 2002:32). In the DoE most programmes are imposed on to educators (schools) without consulting with the SMT as to whether the training is needed, as a result that training receive no support from the SMT because they do not know how to support it (Heystek, 2008:183 and Machles, 2002:32).

2.8   CONCLUSION
Annually, the Department of Education spends vast amount of money on training and development of educators; therefore it is important that such investment lead to visible results on the job. The transfer of learned knowledge and skills from instructional programs remains a paramount concern for training researchers, training practitioners and the school management teams alike.

In this chapter a concerted effort was made to explain and define the problems that SMTs are facing in facilitating transfer of training in schools, as well as to outline the relationships among them. This overview of the literature firstly provides the nature of problems for the transfer of training in schools and secondly, highlight to the roles that different role-players (the trainer, SMT and the trainee) should play in facilitating transfer of training to school. In chapter 3 a description of the research methodology will be provided.

CHAPTER 3

RESEARCH DESIGN AND METHODOLOGY

3.1   Introduction

This chapter is an endeavor to describe the research design. It is important to get clarification on the population and sample of study, data collection tools, data analysis as well as validity and reliability. Ethical considerations for this study are also discussed.

3.2   Research paradigm

There is no cut and dried definition of a paradigm. Many writers define paradigms according to their specific context (Tyala, 2004:42). In general, according to Punch (2009: 16) paradigm means a set of assumptions about the world, and about what constitute proper techniques and topic for inquiring into the world. It simply means that it is a way of looking at the world. It means a view of how science should be done, and is a broad term encompassing elements of epistemology, theory and philosophy, along with methods.

Denzin and Lincoln (2000:19) describe a paradigm as a set of basic beliefs (or metaphysics) that deals with ultimates or first principles. It represents a worldview that defines, for its holder, the nature of 'the world', the individual's place in it, and the range of possible relationships to that world and its parts. They point out that inquiry paradigms define what they are concerned with, and what fall within and outside the limits of legitimate inquiry, and that inquiry paradigms address three fundamental questions, which reflect the assumptions (Denzin and Lincoln, 2000:19; Tyala, 2004: 42 and Punch, 2009:16).
:

- The *ontological question*: What is the form and nature of reality and, therefore, what is there that can be known about it?

- The *epistemological question*: What is the relationship between the knower and what can be known?

- The *methodological question*: How can the inquirer go about finding out what can be known?

    In simpler language, a paradigm tells us:
- What reality is like (ontology)
- What the relationship is between the researcher and that reality (epistemology) and
- What methods can be used for studying the reality (methodology).

These three interrelated questions illustrate the connections between methods and the deeper underlying philosophical issues. Methods are ultimately based on, and derived from, paradigms. Conversely, paradigm has implications for methods (Punch, 2009:16).

It is evident that the researcher does not work haphazardly or as s/he pleases, it is expected that s/he work systematically according to a certain frame of reference which will dictate the kind of methods s/he is to employ as well as the kind of data anticipated. Hence Terre Blanche and Durkheim (1999:36) argue that paradigm act as perspectives that provide a rationale for the researcher and commit the researcher to particular methods of data collection, observation and interpretation.

A paradigm therefore is more than a worldview or philosophy; it also frames the approach and methodology of enquiry. Research texts generally distinguish four chief orientations to research: positivism, interpretivism, critical theory and post-structuralism.

The positivism approach is well suitable for this study. A non-experimental mode of enquiry has been employed. According to McMillan and Schumacher (2001:31); Cohen, Manion, & Morrison (2000:169) this field of study adopt a positivist philosophy of knowing that emphasizes objectivity and quantification of phenomena. As a result, the research design maximizes objectivity by using numbers, statistics, structure, and experimenter control.

Non-experimental mode of enquiry describes something that has occurred or examines relationships between things without direct manipulation of conditions that are experienced (Drew, Hardman, & Hosp, 2008:166). Working in this paradigm implies that the researcher has gathered the information about the SMTs without manipulating their experience about the problems they have with facilitating transfer of training among educators. There are five types of non-experimental mode of enquiry: descriptive, comparative, correlational, survey and *ex post facto.*

For the purpose of this research, a survey has been used. According to McMillan and Schumacher (2001:31) in a survey research the investigator select a sample of subjects and administers a questionnaire or conducts interviews to collect data. The data that was gathered was used to describe characteristics of a population in question.

Surveys are used for wide variety of purposes. According to Leedy & Ormrod (2005:183); Cohen, *et al.* (2000:169) and Ary, Jacobs, Razavieh & Sorensen (2006:399) surveys are used frequently in educational research to describe attitudes, beliefs, opinions, values, demographics, behavior, habits, ideas and other types of information. In this research, a survey has been used to describe the opinions of SMTs about the problems they have in schools to facilitate transfer of training among educators. Usually the research is designed so that information about a large number of people (the population) can be inferred from the responses obtained from a smaller group of subjects (sample).

According to research, surveys can describe the frequency of demographic characteristics or traits held, explore relationships between different factors, or delineate the reasons for particular practices (Leedy & Ormrod, 2005:183; Cohen, *et al.* 2000:169; Ary, *et al.* 2006:399; Fraenkel & Wallen, 2008:390 and Drew, *et al.* 2008:166).

3.3   Research design and research methodology

Leedy and Ormrod (2005:12) refer to a research design as a general strategy for solving a research problem. The research design provides the overall structure for the procedures the researcher follows, the data the researcher collects, and the data analyses the researcher conducts. It is simply a planning. The research methodology is the general approach the researcher takes in carrying out the research project; to some extent, this approach dictates the particular tools the researcher selects.

It is evident that the researcher does not work haphazardly or as s/he pleases; therefore, it is expected that s/he work systematically according to a certain frame of reference which will dictate the kind of methods s/he is to employ as well as the kind of data anticipated

3.4   Quantitative research method

A cross-sectional empirical survey design has been employed. According to Babbie (2008:111) and Mertler & Charles (2008:227) a cross-sectional study involves observations of a sample, or cross-section, of a population or phenomenon that are made at one point in time. In this research the examination of, and comparisons among, the facilitation opinion or attitude and behavior of SMTs toward transfer of training among educators in schools have been observed. All the SMT members making up the sample have been surveyed at the same point in time. This has involved the use of a quantitative research approach. This research approach adopts a positivist philosophy of knowing that emphasizes objectivity and quantification of phenomena (McMillan &

Schumacher, 2005:31). As a result, the research design has maximized objectivity by using numbers, statistics, structure, and experimenter control (De Vos, *et. al.*, 2005:75).

The aim with this design was not to determine cause-and-effect but to survey the views of respondents and summarize facts and opinions through statistical analysis (Leedy & Ormrod, 2005:179).

3.5   Research Tools

Leedy & Ormrod (2005:12) describe a research tool as a specific mechanism or strategy the researcher uses to collect and interpret data. In this study, the researcher has used a structured questionnaire. A questionnaire is a research instrument consisting of a series of questions and other prompts for the purpose of gathering information from respondents (Wikipedia: 2010). Drew, *et al.* (2008:117) describe a questionnaire as the instrument that generates the respondents' response. The researcher has chosen a questionnaire in this study because of the time constraints; there are no other more reliable and valid techniques that could be used. This decision is based on knowledge of the strength as supposed to the weaknesses of this technique (McMillan & Schumacher, 2001:258).

3.5.1 Constructing the Questionnaire

A questionnaire seems simple, yet it can be tricky to construct and administer. According to Leedy & Ormrod (2005:190) one false step can lead to uninterpretable data or an abysmally low return rate. There are many important elements in questionnaire studies that are not apparent on the surface, and several relate directly to the instrument (Drew, *e. al.* 2008:125).

According to Drew, *et al.* (2008:125) the questionnaire represents the link between a researcher and the data. It must stand on its own because a researcher is not usually present to prompt a response or clarify areas where the respondent may be confused. Therefore, it is important to solve as many instrument problems as possible while the

questionnaire is being constructed. The following three important factors by Drew, *et al.* (2008:125), were considered while constructing the questionnaire:

- Legitimacy of questionnaire. The respondent must be convinced that the study is legitimate and worth the effort of response, that is, there must be a high level of questionnaire legitimacy. In this study this part was managed through appropriate well-written cover letter that is on the letterheads of the university and signed by the researcher's supervisor. The cover letter was short and to the point, and it explained the specific purpose of the study and why the research was being conducted (Cohen, *et al.* 2000:260).
- Participant's completion of instrument. The questionnaire itself must contribute to encourage participant response in an accurate manner (Drew, *et al.* 2008:125; Cohen, *et al.* 2000:260). In this study the questionnaire was very short, with only 20 items. All the item questions were closed-ended questions requiring the respondent to mark with an X the answer that represents his/her view on a 4-point Likert scale; as a result the respondents have completed the questionnaire with less effort and less time. This encouraged respondents to complete and return it.
- Designing the questionnaire. The questions being asked in a questionnaire were central to the data collection process. They were clearly worded so that there was minimal chance for the respondent to be confused. The questionnaire was designed very professionally: it was in the form of a booklet, and it was colorful. There were basic guidelines or suggestions that helped the researcher to make a fruitful and efficient questionnaire (Leedy & Ormrod, 2005:190; Ary, *et. al.*, 2006:425; McMillan & Schumacher, 2001:258; Drew, *et. al.*, 2008:126; Mertler & Charles, 2008:231; Cohen, *et. al.*, 2000: 261) which are:

  - ➢ it was kept short;
  - ➢ Used simple, clear, unambiguous language;
  - ➢ Checked for unwarranted assumptions implicit in the questions;

- ➤ Questions were worded in way that does not give clues about preferred or more desirable responses;
- ➤ Checked for consistency;
- ➤ Determined in advance how responses would be coded;
- ➤ Kept the respondent's task simple;
- ➤ Provided clear instructions;
- ➤ Gave a rationale for any items whose purpose may be unclear;
- ➤ Made the questionnaire attractive and professional looking;
- ➤ Conducted a pilot test; and
- ➤ Scrutinized the almost-final product carefully to make sure it addresses the researcher's needs.

3.5.2 Types of questions

The nature of the questions and the way they are asked are extremely important in survey research. According to Fraenkel & Wallen (2008:396) poorly worked questions can doom a survey to failure. Hence, questions in this study were clearly written in a manner that was easily understandable by the respondents. The researcher has followed Fraenkel & Wallen's advice, by using closed questions to measure the opinions, attitudes and knowledge of the SMTs on transfer of training. Closed-ended questions in this questionnaire were easy to use, to score, and to code for analysis on a computer (Fraenkel & Wallen, 2008:396). Since all subjects responded to the same options, standardized data were provided.

3.5.3 Order of questions

The order in which questions appear may also have an influence on respondents' responses. Drew, *et al.* (2008:128) contends that it is usually best to place the easily answered questions first. In this way the respondents may become more committed to complete the questionnaire as they proceed because they will have already spent time on the task. Similarly, if there are sensitive questions or open-ended items requiring

more effort, these are best placed at the end of the questionnaire. The reason for this is that even if the respondents decline to answer these more specific items, the responses to other questions will have already been provided and there is greater likelihood that the survey will be returned (Drew, *et. al.*, (2008:128; Ary, *et al.* 2006:428).

3.5.4 Advantages of the questionnaire

Questionnaires have advantages over some types of survey in that they are cheap, do not require a much effort for questioner as verbal or telephone surveys, and often have standardized answers that make it simple to compile data. Questionnaires are easy to administer confidentiality. Questionnaires also save time (Cohen, *et. al.*, 2000:245; McMillan & Schumacher, 2001:257). A questionnaire tends to be more reliable, because it is anonymous; it encourages greater honesty (though, of course, dishonesty and falsification might not be able to be discovered in a questionnaire) (Cohen, *et. al.*, 2000:129).

3.5.5 Disadvantages of the questionnaire

Although questionnaires are commonly used in social research studies, they have some disadvantages. Some of the disadvantages are (Ary, *et al.*, 2006:438; (McMillan & Schumacher, 2001:257) :

o Nonresponse. There are often too low a percentage of returns in a survey research. It may be due to a number of reasons such as lack of interest in the topic being surveyed, forgetfulness, and unwillingness to be surveyed and so on. In this research the researcher delivered the questionnaire personally to school to ensure greater response. Although some of the SMT members refused to participate, the questionnaire was given to those who were willing to participate in other schools.

- o Misinterpretation of the questions/ concepts. Any misunderstandings experienced by the interviewee cannot be addressed because the interviewer is not there. In this research the researcher explained the research topic to the respondents because he personally delivered the questionnaire to schools. The researcher realized that most of the respondents had a problem with understanding the term "transfer of training" which he explained it to them.

According to Fraenkel & Wallen (2008:123) if only closed items are used, the questionnaire may lack coverage or authenticity; and if only open questions are used, respondents may be unwilling to write their answers for one reason or another. Questionnaires present problems to people of limited literacy. In most cases questionnaires are filled in hurriedly (Fraenkel & Wallen, 2008:123).

3.6   Structured questionnaire

A structured questionnaire has been used for the purpose of identifying problems experienced by SMTs in facilitating transfer of training. According to Ary, *et al* (2006: 21) and Cohen, *et al.* (2000:247) a structured questionnaire is a more closed and numerical questionnaire. This type of questionnaire is useful in that it can generate frequencies of response amenable to statistical treatment and analysis. It also enables comparisons to be made across groups in the sample. The structured questionnaire has enabled the researcher to collect large amount of data and learnt about a large population within a short period of time. The questionnaire has also made easy for the researcher to administer confidentiality (Babbie, 2008:282). The theoretical discussion on the nature and problems related to transfer of training has served as the basis for deriving the categories and individual question items that have been included in the questionnaire.

This questionnaire contains clear instructions and introductory comments as well as basic instructions for completing it (Babbie, 2008:282). It begins by telling the respondents exactly what they should do: that they are to indicate their answers by placing an *X* in the appropriate box beside the appropriate question. The Likert scaling

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technique has been used in the questionnaire to determine the relative intensity of different items (Babbie, 2008:188; Drew, *et al.* 2008:251). According to Ary, (2006:227) a Likert scale assesses attitudes toward a topic by presenting a set of statements about the topic and asking respondents to indicate for each item the seriousness to which they experience the problem with the trainees. The questionnaire is divided into three sections where Section A is Biographic and Demographic information; Section B dealing with Training problems related to educators (trainees) and Section C dealing with Training problems related to the work environment (McMillan & Schumacher, 2001:262; Cohen *et al.* 2000:253).

3.7   Population and sample

The population is that group (usually of people) about whom we want to draw conclusions or we are interested in generalising about (Fraenkel & Wallen, 2008:91). Babbie (2008:211) defines a population as a theoretically specified aggregation of study element. Therefore, a study population is that aggregation of elements from which the sample is actually selected.

 McMillan & Schumacher (2001:169) contend that a population is a group of elements or cases, whether individuals, objects, or events, that conform to specific criteria and to which we intend to generalize the results of the research. The population under investigation is fundamental, both with respect to identifying appropriate respondents for research question and obtaining a representative sample. According to Drew, *et al,* (2008:83), therefore, a population refers all constituents of any clearly described group of people, events, or objects who are the focus of an investigation. Ary, *et al.* (2006:167) a population is defined as all members of any well-defined class of people, events, objects. A sample is a portion of a population.

Therefore, a population can be defined as including all people or items with the characteristics one wishes to understand. Because there is rarely enough time and

money to gather information from everyone or everything in a population, the goal becomes to finding a representative sample (or subset) of that population.

In a quantitative research individuals who participate in the study are referred to as subjects. McMillan & Schumacher (2001:169). It is from them that the data is collected. As a group subjects are usually referred to as a sample. The sample can be selected from a large group of persons, identified as the population (Ary, *et al.* 2006:167).

A sample refers to a small part (group) representing the whole. In terms of Oxford South African School Dictionary (2010), sample means to test part of a thing or question part of a group of people to find out what the rest is like. According to Fraenkel & Wallen (2008:91) a sample in a research study is a group on which information is obtained.

Sampling refers to the process of selecting sample of individuals who will participate in the research process. According to Wikipedia (2010) sampling is that part of statistical practice concerned with the selection of an unbiased or random subset of individual observations within a population of individuals intended to yield some knowledge about the population of concern, especially for the purpose of making predictions based on statistical inference. Sampling is an important aspect of data collection. The main advantages of sampling are that the cost is lower, data collection is faster, and since the data is smaller it is possible to ensure homogeneity and to improve the accuracy and quality of data (Wikipedia, 2010). The decision about the population and sampling are related to decisions about the research method to be used (Babbie, 2008:211).

This study has been conducted in 24 schools in the Itsoseng Cluster. This Cluster has a total of 305 educators (24 Principals, 96 Heads of Departments including Deputy Principals and Senior Educators and 185 Cs-Educators). Firstly a random sample of schools has been made from a list of all the 24 schools and, using the table of random numbers, 10 schools were selected. Each school had an equal chance of selection independent of any other event in the selection process (Babbie 2008:212). In this way

each member of the population of schools had an equal chance of being selected (Leedy & Ormrod, 2005:199; Mouton, 2006:138).

A purposive sampling was appropriate for this study given the title of this research. According to Babbie, (2008:204) purposive sampling refers to selection of a sample on the basis of knowledge of a population, its elements, and the purpose of the study. Purposive sampling is a type of nonprobability sampling in which the units to be observed are selected on the basis of the researcher's judgment about which ones will be most useful or representative.

In a purposive sampling, researchers handpick the cases to be included in the sample on the basis of their typicality (Cohen, *et al.* 2000:92). In this way, the researchers build up a sample that is satisfactory to their specific needs. As its name suggests, the sample has been chosen for a specific purpose, in this case, a group of SMT members in schools has been chosen as the research is studying the problems experienced by the SMTs in facilitating transfer of training in schools. Whilst it may satisfy the researcher's needs to take this type of sampling, it does not pretend to represent the wider population; it is deliberately and unashamedly selected and biased (Cohen, *et al.* 2000:104).

Through purposive sampling a total of 70 SMT members (Principals, Deputy principals, HODs and Senior Educators serving in the SMT) has been involved in the study, assuming that on average each school has 4 Heads of Department and one principal (N=70). According to Babbie (2008:204) purposive sampling refers to selection of a sample on the basis of knowledge of a population, its elements, and the purpose of study. Purposive sampling was used because the SMT members are knowledgeable about the problems involved in facilitating transfer of training in schools. This satisfies the requirements that in purposive sampling respondents are selected according to a specific purpose rather than randomly (Tashakkori & Teddlie, 2003:713). Table 3 below shows the response rate of the respondents:

Table 3: Response rate of respondents

Number of questionnaires	Number issued	%	Number Returned	%	Number Not Returned	%
70	70	100	68	97,14	2	2,86

3.8   Data collection

The researcher delivered and collected questionnaires personally from the participating schools to ensure a high response rate. The researcher has set up an appointment with the selected schools and requested that all Heads of Department and Principal gather in a room to fill in the questionnaire. In this way the researcher was able to explain the purpose of the research and guided respondents in completing the questionnaires (Babbie, 2008: 282). This enabled the researcher to respond to problems that respondents encountered in responding to the questionnaire.

3.9   Data Analysis

Data was analyzed using descriptive statistics which includes frequencies, percentages and mean scores in order to summarize the data and obtain an overall picture of patterns and tendencies presented by the data. Furthermore the mean score ranking technique was used in order to determine the most and the least important problems facing the School Management Teams. The ANOVA and t-test were also applied to compare some of the biographical details with the factors in Section B and C.

3.10 Reliability and **V**alidity

It is important for a researcher to select an appropriate criterion measure during the planning of an investigation and define that measure in a manner that allows for reliable

and valid recording of what happened (Drew, *et. al.* 2008:110). Measurement reliability refers to the consistency of performance and measurement validity refers to the degree that a test assesses what it is intended to measure (Leedy & Ormrod, 2005:29; Mouton, 2006:144). Both concepts are important to consider when it comes to the selection or design of the instruments a researcher intends to use (Fraenkel & Wallen, 2008:147). Leedy & Ormrod (2005:27) emphasize that the validity and reliability of your measurement instruments influence the extent to which you can learn something about the phenomenon you are studying, the probability that you will obtain statistical significance in your data analysis, and the extent to which you can draw meaningful conclusions from your data.

3.10.1 Reliability

It is important to be very specific in defining a measure. Selecting a more detailed and specific criterion measure has several advantages (Drew, *et al.* 2008:111). Such definitions leave less room for error and misjudgment, and they improve measurement reliability. A clear definition of what the measure is will make it easier to determine when have seen a particular performance.

Reliability is described the same by different researchers. According to Fraenkel & Wallen (2008:147) reliability refers to the consistency of scores or answers from one administration of an instrument to another, and from one set of items to another. Leedy & Ormrod (2005 29) and Ary, *et al.* (2006:254) describe reliability as the consistency with which a measuring instrument yields a certain result when the entity being measured hasn't changed. According to McMillan & Shumacher (2001:239) reliability refers to the consistency of measurement, that is, the extent to which the results are similar over different forms of same instrument or occasions of data collection. Another way to reliability is to determine the extent to which measure are free from error. If an instrument has little error it is reliable, and if it has a great amount of error it is unreliable.

The Cronbach Alpha coefficient has been applied to all sub-sections of the questionnaire in order to establish the internal consistency of individual question items. Reliability of the questionnaire has also been inferred by comparing the results of the pilot study with those of the main empirical research. Table 4 below shows the results:

Table 4: Cronbach Alpha Coeficient

Variable	Cronbach Alpha Co-efficient
Section B: Training Problems related to educators	0,89
Section C: Training Problems related to work environment	0,90

3.10.2 Validity

Validity of a measuring instrument is the extent to which the instrument measures what it is supposed to measure (Best & Kahn, 2003:283; De Vos, *et. al.* 2005:160; Mouton, 2006:109; Ary, *et al.* 2006:243; Babbie, 2008:160). According to Fraenkel & Wallen (2008:148) validity refers to the appropriateness, meaningfulness, correctness and usefulness of the inferences a researcher makes based on the data s/he collect.

Validity is the primary concern of all researchers who gather educational data. According to Suter (2006:248) reliability plays the second fiddle to validity because reliability is of little concern if the measure is not a valid one. Suter (2006:248) contends that there is no value in consistently measuring something that is off target, misguided, or simply the wrong construct. Reliability is a necessary condition for validity in the sense that reliability must be present for validity to exist, but reliability does not guarantee validity. This because a measure may be reliable but not measuring what it should. It might be reliably measuring something else (Suter, 2006: 248; McMillan & Shumacher, 2001: 239).

Therefore, reliability tells us how well an instrument is measuring whatever it is measuring. If it is measuring whatever it is measuring with little error, then we know that it is reliable. Reliability does not tell what is being measured; only how well it is measuring (whatever it is measuring). The issue of what is being measured is the sole concern with validity.

In a quantitative study validity might be improved through careful sampling, appropriate instrumentation, and appropriate statistical treatment of data (Cohen, *et al.* 2000:105). It is impossible for research to be hundred percent valid. Cohen, *et al.* (2000:105) warn that quantitative research possesses a measure of standard error which is inbuilt and which has to be acknowledged. Validity should be seen as a matter of degree rather than an absolute state. Hence, at best strive is made to minimize invalidity and maximize validity (Cohen, *et. al.* 2000:105).

Researchers have found it is useful to approach the issue of validity from three angles, each angle being relevant for the specific purpose the instrument is intended to serve. These three types of validity are as follows (Suter, 2006:249; Babbie, 2008:161; Fraenkel & Wallen, 2008:148. Ary, *et. al.* 2006:244):

- o *Content validity*
  Refers to how much (degree to which) a measure cover the range of meaning included within a concept.
- o *Predictive validity (criterion- related)*
  Refers to the degree to which a measure relates to some external criterion.
- o *Construct validity*
  Refers to the degree to which a measure relates to other variables as expected within a system of theoretical relationships.

To achieve validity, a pilot study have been undertaken to ensure that respondents understand the questions. The researcher gave the questionnaire to his colleagues at work to answer it and to correct errors that they have encountered. Each question was

discussed to check whether it gave the same result to all of the colleagues. Moreover a factor analysis has been conducted to find out the inter-correlation between different question items within each of the categories of the questionnaire.

3.11 Ethical considerations

In common usage, *ethics* is typically associated with morality, and both deals with matters of right and wrong. Babbie (2008:67) ethical refers to conforming to the standards of conduct of a given profession or group. Therefore, this implies that anyone involved in social scientific research needs to be aware of the general agreement shared by researchers about what is proper and improper in the conduct of scientific inquiry. According to Leedy & Ormrod (2005:101) the researcher needs to take the welfare of respondents into consideration. In their words "First and foremost the researcher has an obligation to respect the rights, needs, and values, and desires of the informant(s)". Before the researcher could do anything concerning the respondents s/he has to check with them first, that is, s/he had to get their permission to involve them.

The following are some of the ethical issues that the researcher has considered:

- Informed consent

Research respondents have been told the nature of the study to be conducted and given the choice to either participating or not participating (Leedy &Ormrod, 2005:101). Furthermore, they have been told that, if they agree to participate, they have the right to withdraw from the study at any time. Respondents were told that their participation is strictly voluntary and that if they felt uncomfortable in completing the questionnaire they should feel free not to participate. The ethical norms of voluntary participation have also been formalized in an informed consent form which has been signed by each participant.

- Anonymity

The essence of anonymity is that information provided by the respondents should in no way reveal their identity. In this research the respondents are considered anonymous because the researcher cannot identify the respondents from the information provided (Cohen, *et. al*. 2000:61). The questionnaire does not provide for the respondents' personal information, as a result the respondents' privacy is guaranteed.

- Confidentiality

The second way of protecting the respondents' right to privacy was through the promise of confidentiality (Cohen, *et. al*. 2000:61). This means that although the researcher knows who has provided the information or are to identify the respondents from the information given, they will in no way make the connection known publicly; their boundaries surrounding the shared secret will be protected. In this research, the informed consent letter was explicit about this issue and respondents were made aware of it. In the questionnaires, the respondents were assured that the information they furnished would be made available to my supervisor and me only. The researcher has also reiterated the fact that the study was for academic purposes and nothing else.

- Protection from harm

The ethical norms of no harm to the respondents have been formalized in an informed consent form which has been signed by each participant. According to Leedy & Ormrod (2005:101) researcher should not expose research respondents to undue physical, emotional or psychological harm. As a general rule, the risk involved in participating in study should not be appreciably greater than the normal risks of day-to-day living. Respondents should not risk losing life or limb, nor should they be subjected to unusual stress, embarrassment, or loss of self-esteem. This action means that respondents must base their voluntary participation in this research project on a full understanding that the possible risks involved (Babbie, 2008:69).

- Approval to conduct research in schools

Approval was obtained from the North West Education Department, via the office of the Cluster Manager. The participating schools will be informed of the proposed project and permission letter to conduct a research will be given to the Principal and educators.

The questionnaire and procedures to be followed by the researcher in the empirical study has been submitted to the North West University's Ethics Committee for approval. The researcher is known among and has built a rapport with the respondents through professional encounters. The respondents know that the researcher is "one of them" and care about their total well-being in their role.

3.12   Conclusion

The research design and method used in this study have been explained this chapter. Furthermore, the population and sample as well as reliability and validity were clearly delineated. Data collection strategies and ethical issues were elucidated.

CHAPTER 4

ANALYSIS AND INTERPRETATION OF DATA

4.1   Introduction

In this chapter the responses of the SMTs will be analyzed and interpreted. A total of 68 SMT members in Itsoseng Cluster of education participated in the survey. All of them met the criteria set out in chapter 3; they are all serving as members of the SMT in their respective schools.

4.2   Biographic and Demographic information

The biographic and demographic information collected for this study includes age, gender, Highest professional Qualification, Highest Academic Qualification, number of years as a principal or HOD, number of years in the current school, position held at the school, phase presently teaching and school situation. The following table (Table 5) shows the biographical and demographic information:

Table 5: Biographical and demographic data of respondents

Question Items	Variables	Frequency (Count)	%
A.1 Age	2: 31-40	10	14,7
	3: 41-50	27	39,7
	4: 51-60	24	35,3
	5: 61+	3	4,4
	Missing	4	5,9
Total		68	100
A.2 Gender	1: Male	31	45,6
	2: Female	31	45,6
	Missing	6	8,8
Total		68	100
A.3 Highest Professional Qualification	1: PTC	1	1,5
	2: PTD	3	4,4
	3 STD/SED	6	8,8
	4: UED	2	2,9
	5: UDE	22	32,4
	6: (OTHERS SPECIFY)	25	36,8
	Missing	9	13,2
Total		68	100
A.4 Highest Academic Qualification	1: STD 10/Grade 12	11	16,1
	2: Bachelors Degree	22	32,4
	3: Honours Degree	22	32,4
	4: Masters Degree	4	5,9
	Missing	9	13,2
Total		68	100
A.5 Number of years as Principal/HOD	1: 01-03	9	13,2
	2: 04-06	11	16,2
	3: 07-09	6	8,8
	4: 10+	35	51,5
	Missing	7	10,3
Total		68	100
A. 6 Number of years in the current school	1: 01-03	6	8,8
	2: 04-06	6	8,8
	3: 07-09	6	8,8
	4: 10+	44	64,8
	Missing	6	8,8
Total		68	100
A.7 Position held at the school	1: Principal	17	25,0
	2: Deputy Principal	7	10,3
	3: HOD	33	48,5
	4: Senior Educator	7	10,3
	Missing	4	5,9
Total		68	100
A.8 Phase presently teaching	1: Primary	22	32,4
	2: Secondary	40	58,8
	Missing	6	8,8
Total		68	100
A.9 School Situation	1: Rural	31	45,6
	2: Urban	28	41,2
	Missing	9	13,2
Total		68	100

4.2.1 Age

The ages of the respondents (A1) were examined. Data analysis revealed that all the respondents are 31 years and above, there is no one in the age category 21 - 30. This implies that all the SMTs who participated in this research are not novices in the teaching fraternity. Age category 21-30 is the ages of educators who have just joint the profession. Data reveals that 10(14.75%) are in the age category of 31- 40, and only 3(4.4%) are in the age category of 61years and above. The majority of the SMTs are clustered in the age category of 41- 50 (39.7%) and 51- 60 (35.3%). This implies that they've got a wealth of experience in teaching and management.

4.2.2 Gender

Responses to gender (A2) show that gender equality is observed in this cluster. The frequency revealed that 31(45.6%) of the respondents were males and 31(45.6%) were females. This implies that there is an equal representivity of males and females in the management of schools in Itsoseng cluster. It shows that the gap in gender disparity is gradually closing in term of Employment of Educators Act, Act 76 of 1998(7)1, Emplyment Equity Act, Act 55 of 1998.

4.2.3 Highest Professional Qualification

Regarding to this item (A3), 58(85,3%) of the respondents have 3years professional qualifications, that is, post STD 10 qualifications. Only 1(1.5%) is have a 2years professional qualification. From the 85,3% of the respondents with 3years professional qualifications, 25(36.8%) have post diploma qualifications. This implies that most of the SMTs are professionally qualified. Since that they are better qualified, they are in good the position (standing) to assist their subordinates to transfer training to their workplace.

4.2.4 Highest Academic Qualification

Regarding this item (A4), 11(16.2%) have STD 10, 22(32.4%) have Bachelors degree, 22(32.4%) have Honours degree and only 4(5.9%) have Masters Degree. There is no one with Doctoral degree. This implies that most of the SMT members are academically well equipped to deal with problems of management in their schools.

4.2.5 Number of years as Principal or HOD

For the number of years as Principal or HOD (A5), 35(51.5%) of the respondents have been in management for 10years and more. This is an indication that most of the SMT members have a lot of experience and expertise in their duty as school managers. Only 9(13.2%) have been in management for 3years and less. There are 11(16.2%) who fall in the category of 04- 06 years, and only 6(8.8%) who fall in category of 07- 09 years.

4.2.6 Number of years in the current school

For this item (A6), 44(64.7%) have been in the current school for 10 years and more, 6(8.8%) for 01- 03 years, 6(8.8%) for 04- 06 years and 6(8.8%) for 07- 09 years. This implies that they understand their schools very well and also understand all the problems they are faced with everyday in their schools.

4.2.7 Position held at the school

Regarding this item, 17(25%) of the respondents are school principals, 7(10.3%) are deputy principals, 33(48.5%) are HODs and only 7(10.3%) are senior educators. There are no PL1 educators serving in the school management teams of the schools are participating in this research. The indication is that in most schools the SMT is formed by the principals and the HODs, while deputy principals and senior educators are only in few schools. This implies that SMT s have quiet an influence on the educators to ensure that transfer of training is taking place.

4.2.8 Phase presently teaching

For the phase presently teaching (A8), 22(32.4%) of the respondents are from the primary schools, while 40(58.8%) are from the secondary schools. This implies that enough data has been obtained from both phases.

4.2.9 School situation

In terms of the school situation (A9), 31(45.6%) of the respondents say that their schools are situated in a rural area and 28(41.2%) say that their schools are in the

urban area. This implies that most the schools are not disadvantaged in terms of resources, accessibility and access to information.

4.2.10 Conclusion

The discussion above on biographical information of the SMT members will be of great assistance in understanding the nature of the problems experienced by SMTs in facilitating transfer of training among educators in schools. Some of the data will be used in the further analysis in the next section.

4.3   ANALYSIS OF RESPONSES OBTAINED IN SECTION B OF THE QUESTINNAIRE: TRAINING PROBLEMS RELATED TO EDUCATORS.

4.3.1   Introduction

The frequency table (Table 6) below has been used on this section to analyze and interpret data. Frequencies have also been converted into percentages. Clustering of some of the categories has been done and percentages added.

Table 6: Section B: Responses to question items on training problems related to educators

As an SMT member in my school, I experience problems with regard to …		1 Not serious at all		2 Not serious		3 Serious		4 Very serious		missing	%	Mean Score	Rank
		F	%	F	%	F	%	F	%				
B.1	..educators' confidence in their abilities to use newly learned skills in their work	12	17,6	31	45,6	21	30,9	3	4,4	1	1.5	2,22	6
B.2	..educator fear to try out newly learned skills in their teaching practice	16	23,5	31	45,6	18	26,5	3	4.4	0	0	2,11	9
B.3	..educators who are back from training are reluctant to give training to those who did not attend training	19	27,9	16	23,5	21	30,9	10	14,7	2	2,9	2,33	5

B.4	..educators who are back from training fail to give feedback to those who did not attend training	22	32,4	22	32,4	16	23,5	8	11,7	0	0	2,14	7
B.5	..educators do not choose training courses they wish to attend but are assigned to specific training course	16	23,5	12	17,7	23	33,8	16	23,5	1	1,5	2,58	2
B.6	..educators feel that knowledge and skills gained at training are not relevant to their situation of educators	22	32,3	25	36,8	11	16,2	10	14,7	0	0	2,13	8
B.7	..educators lack skills to match what has been learned at training with their everyday teaching duties	11	16,2	21	30,9	26	38,2	10	14,7	0	0	2,51	3
B.8	..educators have no interest in in-service training courses	24	35,3	26	38,2	9	13,2	6	8,8	3	4,4	1,95	10
B.9	..educators have no inputs in the content of the training programme	16	23,5	19	27,9	19	27,9	12	17,7	2	2,9	2,40	4
B.10	..educators feel their teaching work suffer (falls behind) while they attend training courses	14	20,6	10	14,7	23	33,8	21	30,9	0	0	2,75	1

4.3.1.1 Item B1: …educators lack confidence in their ability to use newly learned skills in their work.

The frequency in this item indicates that 31(45.6%) of the SMTs does not have a serious problem in this regard. 21(30.9%) have a serious problem and only 3(4.4%) have very serious problem. This implies that even though 45.6% to use newly learned skills, 24(26.3%) have serious to very serious problem in this regard. This 26.3% contribute negatively to the transfer of training. According to the frequency, 12(17.6%) do not have problems at all. This implies that only 17.6% of the SMT are competent enough and are making sure that transfer of training is taking place (par. 1.2 and 2.6.1.2).

4.3.1.2 Item B2: …educators fear to try newly learned skills in their teaching.

The majoring of the SMTs, 31(45.6%) indicated that they have no serious problem with educators fearing to try newly learned skills in their teaching. This is a good indication given the SMTs' experience in management. The SMTs use their expertise to encourage educators and to lay down their fears of trying newly learned skills in their teaching. Only 16(23.5%) have no problems at all in this regard. Frequency in this item also indicates that 18(26.5%) have a serious problem and 3(4.4%) have very serious problem. This implies that 21(30.9%) have a serious to very serious problem with educators fearing to try newly learned skills in their teaching. This 30.9% is contributing negatively to the transfer of training in schools (par.1.2 and 2.6.1.2).

4.3.1.3 Item B3: …educators who are back from training are reluctant to give training to those who did not attend training.

In this Item 19(27.9%) do not have any problem at all, while 16(23.5%) have indicated that problem is not serious. Frequency indicates that 21(30.9%) have a serious problem in this regard and 10(14.7%) have very serious problem with educators who are reluctant to give training to other educators who did not attend training (par.1.2). The implication is that majority of the SMTs, 31(45.6%) have serious to very serious problem on this regard. This means that most educators have the problem with training that was offered, or simply do not benefit from the training offered. They need the assistance of the SMTs to facilitate transfer of training. The problem is that SMTs do not know how to assist educators (par. 1.2)

4.3.1.4 Item B4: …educators who are back from training fail to give feedback to those who did not attend training.

Frequency in this item indicates that majority of the SMTs 22(32.4%) do not have problems at all with trainees giving feedback to those who did not attend training, while 22(32.4%) indicate that problem is not serious. This implies that 44(64.8%) do not have

a problem at all or the problem is manageable. There is a good indication that educators give their colleagues feedback while they are from training. The problem is that the frequency indicates that there are still SMTs 16(23.5%) who have a serious problem in regard and 8(11.8%) who have very serious problem. The indication is that although 64.8% of respondents doing well in this item, there is 24(35.3%) who are finding it problematic (par. 2.3).

4.3.1.5 Item B5: …educators do not choose training courses they wish to attend but are assigned to specific training courses.

The majority of the SMTs 23(33.8%) has a serious problem with regard to this item. It is also evident from the frequency that 16(23.5%) have very serious problem on this regard. This implies that 39(57.3%) find this item a problem. Educators are just going to the training for the sake of "it is a job requirement", and not that they chose to attend. Sometime the training might be irrelevant or about what they educator already knows and it becomes boring, hence transfer of training does not occur. Only 16(23.5%) of the SMTs do not have a problem at all with regard to this item. A small number 12(17.6%) of the respondents, indicate that they do not have a serious problem with educators not choosing training courses they wish to attend but assigned to specific training courses (par. 2.6.1.2 and 2.5).

4.3.1.6 Item B6: …educators feel that knowledge and skills gained at training are not relevant to their situation of educators.

In this Item 22(32.4%) of respondents indicated that they do not have problems at all, while 25(36.8%) have indicated that the problem is not serious. This implies that the training (information that is provided during training) is relevant to the education job situations (par. 2.6.1.2). This means that an overwhelming 47(69.2%) of the SMTs do not have problem with regard to this item. This is because the information (training) provided is in line with the curriculum policy and it must followed to the latter. Any deviation from it means deviating from the Departmental Policy. Frequency in this item

also indicates that 11(16.2%) have serious problem with educators who feel that knowledge and skills gained at training are not relevant to their situation of educators. There is only few 10(4.7%) of the SMTs who have very serious problem in this regard. This implies that although the overwhelming majority 47(69.2%) of SMT do not experience problem with regard to this item, 15(20.9%) still experience serious to very serious problem with regard to this item and need to be assisted (par.2.6.1.2)

4.3.1.7 Item B7: …educators lack skills to match what has been learned at training with their everyday teaching duties.

The majority of the SMT members 26(38.2%) have indicated that they have a serious problem with regard to educators' lack of skills to match what has been learned at training with their everyday teaching duties. There are also 10(14.7%) who have indicated that they've got a very serious problem in this issue. A total of 36(52.9%) have a problem with educators' lack of skills to match what has been learned at training with their everyday teaching duties. This implies that SMTs must be trained in order that they can be in a position to assist educators to develop skills that will help them (educators) to transfer training to the work situation. SMTs may discover repeated errors from the trainees but do not know what corrective actions to take (par. 2.2.3) Only 11(16.2%) have indicated that they do not have problems at all, while 21(30.9%) have indicated that they do not have a serious problem with this issue.

4.3.1.8 Item B8: …educators have no interest in in-service training courses.

Although majority of the SMTs have serious to very serious problem with items B3, B5 and B7; 24(35.3%) of the SMTs indicate that they do not have a problem at all with the interest of educators in in-service training courses. This is supported by the 26(38.2%) who have indicated that the problem is not serious. This implies that educators like to attend in-service training course for their own benefit and for the benefit of their schools. (par.2.3). The DoE should provide nationally accredited learning programmes so that the educators are motivated to attend and gain new skills and competencies relevant to

their job (par.2.7.2). Only 9(13.2%) have indicated that they are experiencing serious problem with this matter. A very few 6(8.8%) have a very serious problem with educators' interest in in-service training courses.

4.3.1.9 Item B9: …educators have no inputs in the content of the training programme.

In this item, a balance has almost being reached between those who have problems related to the item and those who do not have problem with related to this item. Frequency indicates that 16(23.53%) have indicated that they do not have a problem at all, while 19(27.94%) have indicated that the problem is not serious. This implies that 35(51.47%) of the SMTs experience no problem at all with this issue or the problem is not serious. On the other hand, 19(27.94%) have indicated that they've got serious problems on this matter and 12(17.64%) have very serious problems regarding this matter. An indication is that 31(45.58%) have serious to very serious problem with regard to this item. This implies that needs analysis need to be conducted from educators before training takes place. SMTs and educators inputs must be taken into consideration. This exercise will encourage educators to transfer training to the workplace (par.2.6.3) and it will also encourage SMTs to support the educators who are from training to implement newly learned skills and knowledge to the job.

4.3.1.10 Item B10: …educators feel that their teaching work suffers (fall behind) while they attend training courses.

Most of the SMTs 23(33.8%) has indicated that they have a serious problem regarding this issue. This adds to 21(30.9%) who have indicated that they've got a very serious problem in this regard. This shows the seriousness of the problem as a total of 44(64.7%) have a serious to very serious problem with regards to educators feeling that their teaching work suffers while they attend training courses. This implies that SMTs and Department of Education should find some time outside formal teaching time to conduct training for educators. An incentive must be given to encourage educators to

attend training during their spare time, that is, during weekends and holidays. Only 14(20.6%) do not have a problem at all with this matter and 10(14.7%) indicated that the problem is not serious. Therefore, the indication is that only 24(35.3%) do not have a problem at all or the problem is not serious.

4.3.2 Conclusion

The discussion above has outlined that transfer of training pose a serious problem to the SMTs. This is significant in every item (B1- B10) analyzed, where there is a significant numbers of SMTs who experience serious to very serious problems with every item. In some items (B5, B7 and B10) the problem is very serious. The discussion above can be concluded as follows:

- o 64.7% of the SMTs have serious to very serious problems with regard to educators' feeling that their teaching work suffers while they attend training courses.
- o 57.3% experience serious to very serious problems with educators not given chance to choose training courses they wish to attend.
- o 52.9% experience serious to very serious problems with educators lacking skills to match what has been learned at training with their everyday teaching duties.

4.4 RESPONSES TO QUESTION ITEMS ON TRAINING PROBLEMS RELATED TO THE WORK ENVIRONMENT (SECTION C).

4.4.1 Introduction

The purpose of this section is to provide a clear picture of the problems experienced by SMTs with regard to the school environment that does not encourage educators to apply skills and knowledge gained in training at their work situation. This section aims at determining the seriousness of these problems. The rank ordering technique was be employed to achieve the aforementioned aim accompanied by the four point Likert

Scale viz. 1= not at all, 2= not serious, 3= serious and 4= very serious. The following table (Table 7) shows the frequency of the problems in section C:

Table 7: **Training problems related to the work environment**

As a member of the school management team (SMT), I experience the following problems	1 Not serious at all		2 Not serious		3 Serious		4 Very serious				Mean Score	Rank
	F	&	F	%	F	%	F	%	missing	%		
C.1 ..enabling educators to support group norm for improvement and upholding of high standards	12	17,6	30	44,1	22	32,4	4	5,9	0	0	2,26	6
C.2 ..organising meetings for feedback from those who have been trained	23	33,8	23	33,8	14	20,6	7	10,3	1	1,5	2,07	10
C.3 ..organising meetings for trained educators to train others in the school	20	29,4	17	25,0	23	33,8	8	11,8	0	0	2,28	5
C.4 ..motivate educators who have undergone training to use the newly learned skills	16	23,5	26	38,2	18	26,5	8	11,8	0	0	2,26	6
C.5 ..assisting educators in identifying situations where the newly gained skills can be applied	16	23,5	23	33,8	23	33,8	5	7,4	1	1,4	2,25	8
C.6 ..provides opportunities for educators to perform learned behaviour, knowledge and skills in the school	17	25,0	25	36,8	19	27,9	4	5,9	3	4,4	2,15	9
C.7 ..providing resources that educators need to apply their newly gained skills	17	25,0	18	26,4	22	32,4	11	16,2	0	0	2,40	4
C.8 ..obtaining assistance from the course leaders and subject advisors to give in-school support to trained educators	12	17,6	25	36,8	17	25,0	13	19,1	1	1,5	2,46	3
C.9 ..giving incentives to educators for practising skills learned in training	12	17,6	16	23,5	17	25,0	18	26,5	5	7.4	2,65	2
C10 ..providing time for professional development activities	12	17,6	14	20,6	25	36,8	17	25,0	0	0	2,69	1

within the regular school day												

The results depicted in the above table 7 are discussed below.

4.4.1.1 Item C1: …enabling educators to support group norms for improvement and upholding of high standards.

Frequency in item indicates that the majority of the SMTs 42(61.8%) do not have problems at all or the problem is not serious with regard to enabling educators to support group norms for improvement and to upholding of high standards. It is evident from the 12 (17.7%) who have indicated that they don't have problems at all and the 30(44.1%) who indicated that the problem is not serious. This implies that the SMTs use their skills and qualifications (A3 and A4) as well as their experience in management (A5) to support educators well in this regard (par.2.6.2.1). There are, however, 22(32.4%) of the respondents who indicated that they experience serious problems this matter. A very few 4(5.9%) experience a very serious problem. This implies that 29(38.3%) of the SMTs experience serious to very serious problems with regard to this matter. This may be because of lack of experience (A5) and lack of management qualifications (A4) (par.2.6.2.1).

4.4.1.2 Item C2: …organizing meetings for feedback from those who have been trained.

The majority of the SMTs 46(67.6%) has indicated that they do not have problems at all or the problem is not serious. This percentage is derived from the 23(33.8%) who have indicated that they don't have problems at all and the 23(33.8%) who have indicated that the problem is not serious. This is attributed to their experience in management (A5) and their qualifications in educational management (A3). Another contributing factor is the position that they are holding at the school (A7). It was indicated that of the SMT members are Principals and HODs, as a result they've the powers to organize

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meetings and demand feedback from those who are from training. Only 14(20.6%) have indicated that they have serious problems and 7(10.3%) have very serious problems.

4.4.1.3 Item C3: …organizing meetings for trained educators to train others in the school.

Organizing is one of the management functions. This is evident from the number of the SMTs, 20(29.4%) who have indicated that they do not have problems at all with organizing meeting for trained educators to train others in the school. This implies that SMTs are using their experience (A3 & A4), qualifications (A5), and their position held at school (A7) correctly to motivate educators. There are 17(25%) who have indicated that the problem in not serious. This implies that 37(54.4%) do not have problems at all or the problem is not serious. On the other hand, frequency indicates that 23(33.8%) are experiencing serious problems on this matter. This is quite a significant number when one compares it to 29.4% who have indicated that they do not have problems at all. This implies that most of the SMTs are lacking organizational skills. Only 8(11.8%) have indicated that they've got very serious problems with this matter.

4.4.1.4 Item C4: …monitoring educators who have undergone training to use the newly learned skills.

In this item, 16(23.5%) of the SMTs have indicated that they don't have problems at all, while 26(38.2%) indicating that the problems are not serious. This implies that SMTs motivate and support educators who have undergone training to use their newly learned skills on the job. Still, there are those SMT members 18(26.5%) who are experiencing serious problems with motivating educator to transfer training to the job. There are also 8(11.8%) who have very serious problems in this regard. This implies that although 42(61.7%) do not experience problems at all or regard the problems as not serious; there are 26(38.3%) others who experience serious to very serious problems with motivating educators to use the newly learned skills on the job.

4.4.1.5 Item C5: …assisting educators in identifying situations where newly gained skills can be applied.

In this item, 23(33.8%) indicated that the problem is not serious; while another 23(33.8%) have indicated that the problem is serious. The implication is that more training for the SMTs is needed so that they can be in the position to support educators who are from training to identify situations where newly gained skills can be applied (par.2.6 and 2.2.1.1). There are 16(23.5%) who have indicated that they don't have problems at all. There are also 5(7.35%) who have indicated that they experience very serious problems with assisting educators in identifying situations where newly gained skills can be applied.

4.4.1.6 Item C6: …provide opportunities for educators to perform learned behavior, knowledge and skills in the school.

Frequency indicates that 25(36.8%) have indicated that the problem is not serious; while 19(27.9%) have indicated that problem is serious. The percentage is so closed. It implies that SMTs still need a lot of training in managerial skills to be able to direct their departments (educators) so that they create opportunities for educators to transfer learned skill to the workplace. There are 17(25%) who have indicated that they don't have problems at all; while 4(5.9%) saying that they have very serious problems with providing educators opportunities to perform learned behavior, knowledge and skills in the school (par.2.6.2.2 and 2.7.3).

4.4.1.7 Item C7: …providing resources that educators need to apply their newly gained skills.
Frequency in this item indicates that 22(32.4%) have serious problems with providing resources to educators; while 11(16.2%) have very serious problems. This means that 33(48.6%) have serious to very serious problems with this matter. This implies that the SMTs do not have muscle, in terms of money, to provide resources to educators. There

is only 17(25%) who have indicated that they don't have problems at all. There is also 18(26.5%) that have indicated that the problems are not serious (par.2.6.2.2).

4.4.1.8 Item C8: …obtaining assistance from the course leaders and subject advisors to give in-school support to trained educators.

In this item 25(36.8%) of the SMTs have indicated that the problems are not serious; while 17(25%) have indicated that the problems are serious. There are 12(17.6%) who does not have problems at all, and 13(19.1%) who are having serious problems with obtaining assistance from the course leaders and subject advisors to give in-school support to trained educators. The indication is that 37(54.4%) do not have serious problems or do not have problems at all; while 30(44.1%) who are experiencing serious to very serious problems. The implication is that more training is needed for the SMTs to help them support trained educators and facilitate transfer of training among educators in schools.

4.4.1.9 Item C9: …giving incentives to educators for practicing skills learned in training.

This is quiet a very serious problem to the SMTs as 18(26.5%) have indicated that they have very serious problems on it. In addition to this percentage, another 17(25%) have indicated that the problems are serious. The implication is that SMT members 35(51.5%) cannot give incentives to educators for practicing skills learned in training this is really out of the hands of SMTs. The Department of Education should, therefore, help the schools in this regard. When the organization explicitly recognize and rewards the application of newly acquired skills and knowledge, employees will be motivated to effectively transfer these skills to the workplace (par.2.6.2.1 and 2.6.2.2). There are 12(17.7%) who do not have problems at all and 16(23.5%) who have indicated that the problems are not serious.

4.4.1.10 Item C10: …providing time for professional development activities within the regular school day.

The majority of the SMTs, 25(36.8%) have indicated that they have serious problems with providing time for professional development activities within the regular school day. In addition, 17(25%) have indicated that the problems are very serious. Therefore, a total of 42(61.8%) have serious to very serious problems with this issue. This may be attributed to item B10 and item B9 respectively. The implication is that SMTs are not afforded time to analyze and identify their needs, and that of their subordinates for staff development. Trainees just assume that educators need a particular training programme without consulting first with educators (par.2.6.2.2).There are 12(17.7%) who have indicated that they do not have problems at all; while 14(20.6%) say they problem is not serious. Therefore 26(38.3%) have no problems at all or problems are not serious.

4.4.2 Summary of major findings to descriptive statistics

The aim of the above discussion was to determine the seriousness of the problems experienced by the SMTs with regard to the school environment that does not encourage educators to apply skills and knowledge gained in training to their work situation. The discussion has revealed that in every item, C1 to C10, there are SMT members who do not have problems at all or the problem is not serious; while there is a significant number of SMTs who experience serious to very serious problems. As long as there is still numbers of SMTs with serious to very serious problems, it implies that transfer of training is hampered in one way or the other. A lot is still has to be done to train SMTs to facilitate transfer of training among educators in schools. The above discussion can be summarized as follows:
  - o 61.8% of the SMTs experience problems with providing time for professional development activities within the regular school day,
  - o 51.5% experience problems with giving incentives to educators for practicing skills learned in training,

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- o 48.6% experience problems with providing resources that educators need to apply their newly gained skills,
- o 45.6% experience problems with organizing meetings for trained educators to train others in the school, and
- o 44.1% experience problems with obtaining assistance from the course leaders and subject advisors to give in-school support to trained educators.

4.4.3 Application of ANOVA and t-tests

The results obtained in the research were further investigated using Anova and t-test to find out if there were statistically significant differences in responses as a result of the effects of biographic and demographic details. The totals for each section (Section A and Section B) were computed and reflected in the statistical tables because the reliability of factors in these sections was acceptable. Thus a total score for each section was used in computing ANOVA and the t-test.

4.4.3.1. ANOVA results

ANOVA was applied to biographic and demographic details (Section A) and training problems related to educators (Section B) and training problems related to the work environment (Section C). The following biographic and demographic data were tested:

- Highest Academic Qualifications (A4), and
- Age (A1)

The results revealed that there were no statistically significant differences in all the above variables because the p-value was above 0.05.

4.4.3.2. Application of the t-test

Like the ANOVA, the t-test was applied to biographic and demographic details (Section A) and training problems related to educators (Section B) and training problems related to the work environment (Section C). The following variables were tested:

- Gender (A2) (male or female);
- phase presently taught (A8)(secondary or primary), and,
- school situation (A9) (rural or urban).

No statistically significant differences were found. Consequently, no practically significant differences can be reported. The probable reason for these results is that the respondents were a fairly homogenous group, consisting of people who occupy management positions and who have probably attended similar training sessions. This implies that respondents tended to hold the same perspectives.

4.5. Chapter summary

The research findings were presented in this chapter in the form of tables and each table was interpreted accordingly. The biographic and demographic details (Section A) of the respondents were presented and commented upon. The responses to Section B of questionnaire, dealing with training problems related to educators and Section C, dealing with training problems related to the work environment were also reported. It was found that the ANOVA and t-tests yielded no statistically and practically significant differences between the variables.

CHAPTER 5

SUMMARY, FINDINGS AND RECOMMENDATIONS

5.1   INTRODUCTION

This section of the work concludes the findings of the research the way they have been mentioned under the aims of the study (par. 1.3). Findings of this research are derived from both literature study and the empirical study.

5.2   SUMMARY

Chapter 1: The problem of transfer of training is prevailing in the Department of Education, especially in schools. School Management Teams experience many problems with regard to facilitation of transfer of training among educators in schools. Since 1994, a lot of change has occurred in the DoE, which necessitated a lot of training and retraining of educators to be conducted by DoE and NGOs. After training or retraining, educators simply do not transfer the learned attitudes, skills and knowledge to the job situation. SMTs do not know how to assist educator transfer training to the job. There are many factors that inhibit the SMTs to facilitate transfer of training among educators such as trainee characteristics, environmental factors and training design. In this chapter the research aims, research design, research methodology and population of research have been outlined.

Chapter 2: In this chapter the nature and problems of transfer of training in schools have been discussed in depth. A literature study has been conducted to describe the nature of transfer of training, and to give the overall picture of what transfer of training really is. Transfer partnership has been discussed the sources of transfer problems. Three sources of transfer problem, which trainee characteristics, work environmental factors,

and training design factor, have been discussed in depth. The roles of each member of the transfer partnership has also been outlined and discussed in depth.

Chapter 3: This chapter outlines the research design and methodology that the researcher has followed. The research paradigm that the researcher has used has been discussed. In this research a survey has been used, and a questionnaire has been used to collect data. Ethical considerations that the researcher has followed have been outlined and discussed.

Chapter 4: In this chapter the results of the data collected by a questionnaire that was used are analysed and interpreted. All sections of the questionnaire have been statistically represented into tables that give a clear indication of frequencies. Findings of each section of the questionnaire have been discussed and recommendations suggested.

5.3   FINDINGS

5.3.1 FINDINGS ON AIM 1 (par 1.3.1): To analyse the nature of transfer of training in   schools.

With regard to the above-mentioned aim, the following findings from the literature study can be made:

- The Department of Education is conducting training to educators in schools. The training is in the form of workshops and the mode of delivery is usually off-site training that is cascaded to educators at schools (par. 1.2. and 2.3).

- Transfer of training is explained in contrasting terms such as positive/negative, simple/complex/, near /far and automatic/ mindful transfer. In the school situation the preferred types of transfer that yield desirable outcomes are positive, complex, far and mindful transfers (par. 2.4)

- Both on-the-job and off-the-job training is conducted. On-the-job training occurs where Subject Advisors visit schools and train educators on site. Subject Advisors usually visit individual educators on site and help them on curriculum related matters. The off-the-job training usually occurs when educators are called to a common area, eg. Circuit Office or neutral venue, for training (par. 2.2.1).

- In a school situation educators are not at liberty to select the training they wish to attend. The training program is decided and selected by the trainer, and whether it is relevant or irrelevant it does not matter. The training is just imposed to the educators without checking with them or their supervisors first (par. 2.6.1.2).

- Most schools do not have resources that enable educators to transfer training to the job. Resources such as Libraries, Science laboratories, textbooks and finance are very serious problems (par. 2.6.2).

- Transfer of training is impeded by a number of factors that may be divided into specific categories. The most important for the SMTs centre on creating an environment that encourages educators to apply what they learned in training to their everyday teaching duties (par. 1. 2 and 2.6.2)

- Training programs in DoE are conducted afternoons from 14H00 to 18H00, when educators are exhausted and anxious to go home. Sometimes during summer, it is very hot and educators also have to travel to the training venue. Some educators are using public transport or lift clubs, and attending a workshop until late in the evening is not beneficial to them (par. 2.6.5).

- In the school situation educators are not rewarded or recognized for applying newly acquired skills and knowledge to the job because schools do not have capacity to reward educators (par.2.6.2.2).

5.3.2 FINDINGS ON AIM 2 (par 1.3.2.): To identify problems that SMTs experience in facilitating transfer of training among educators.

The findings derived from the empirical investigation revealed the following problems that SMTs experience in facilitating transfer of training among educators:

- The majority of the SMTs have serious to very serious problems with regard to the fact that educators' feel that their teaching work suffers while they attend training courses (par. 2.6.2.2 and 4.3.1.10)

- It has also emerged that SMTs experience serious to very serious problems with educators not given chance to choose training course they wish to attend (par 2.6.1.3. and 4.3.1.5).

- It has emerged again that most of the SMTs experience serious to very serious problems with educators lacking skills to match what has been learned at training with their everyday teaching duties (2.6.1.3 and 4.3.1.7).

- SMTs experience serious to very serious problems with providing time for professional development activities within the regular school day (par 2.6.and 4.4.1.10).

- SMTs experience problems with giving incentives to educators for practicing skills learned in training (2.6.2.2. and 4.4.1.9).

- SMTs experience problems with providing resources that educators need to apply their newly gained skills (par. 2.6.2. and 4.4.1.7).

- SMTs experience problems with organising meetings for trained educators to train others in the school 2.6.2.2. and 4.4.1.3).

5.4 RECOMMENDATIONS

As a result of the above-mentioned literature study and empirical study findings, the following recommendations are suggested in order to answer research aim 3 (par. 1.3.3.):

<u>Recommendation 1</u>

The Department of Education should provide opportunities for educators to further their studies at institutions of higher learning.

<u>Motivation</u>

The above recommendation will develop a pool of educators who are knowledgeable about the frontiers of teaching. A well-qualified educator's corps will minimise the need for educators to leave their classes and attend training courses. Educators who have gone through a great deal of trouble or pain to attain higher qualifications (example, further his/her studies) tend to value it more highly and is likely to transfer his/her acquired knowledge and skills on the job than a person who teach with lower qualifications.

<u>Recommendation 2</u>

The service providers and SMTs should involve the educators in identifying training needs so that training programmes should meet the needs of educators.

<u>Motivation</u>

SMTs should work with trainees prior to their attendance at training programs and set goals for learning and transfer. Educators should be given a chance of identifying their own needs as this will heighten their interest and encourage them to attend training courses. In this way, educators will find value in these training courses and be more inclined to practice what they have learned in their workplace.

<u>Recommendation 3</u>

SMTs should incorporate professional development activities within the regular school day.

Motivation

The idea of incorporating professional development activities within the regular school day seems far-fetched for most schools mainly because of the overwhelming use of off-site training programmes with the resultant neglect of in-house training programmes where educators work collaboratively in their teaching duties and mutually visit each others' classrooms during their free-time.

Recommendation 4

The SMTs, in collaboration with the Department of Education, should provide incentives for educators to apply skills and knowledge gained from training in their everyday teaching. Such incentives should be provided at school level.

Motivation

The more that the DoE and SMTs make the transfer of learned knowledge and skills part of an educator's felt need, the higher the probability that the DoE and SMTs will see motivated behavior in that direction. Incentives should not only be monetary benefits but also in form of certificates of attendance and awards such as the "best educator" awards. The SMT and the School Governing Body should incorporate such incentives in their budgets.

Recommendation 5

The Department of Education should assist schools to acquire resource that educators need to implement learned knowledge and skills to the work situation.

Motivation

Integrated Quality Management System (IQMS) fails because of contextual factors such as lack of resources. Constraints such as resources can influence whether individual apply newly acquired knowledge and skills to the job. Environments with numerous situational constraints reduce transfer of training because individuals may be unable to apply what they learned. Over time they can lose a sense of efficacy that they will be able to apply new ideas or skills, and thus can lose motivation to participate in subsequent learning events.

5.5. Recommendations for further research

The purpose of this study was to determine the problems experienced by the SMTs in facilitating transfer of training among educators in schools. It is recommended that further research studies in this field be undertaken as follows:

- Further research should be conducted with a larger sample including teachers, subject advisors and trainers from NGOs as respondents to throw more light on the problems of transfer of training in schools.
- Research should be conducted using inferential statistical methods to determine the effects of variables such as personality factors, school factors, school-community relations and relationships as factors that impact on transfer of training.
- Research should also be conducted using a qualitative approach in order to delve deeper into the experiences and perceptions of school-based educators (SMTs and teachers). This may reveal hidden problems that are not easily accessible by quantitative methods.

5.4   CONCLUSION

This chapter summarizes the perceptions of the SMTs on the problems they experience in facilitating transfer of training among educators in schools. It also gives a clear indication of the extent of the problem of facilitation among the SMTs. The seriousness of the problems of transfer of training among educators has also been depicted. This is just but a tip of an iceberg; more research on this topic needs to be conducted and the problems of facilitating transfer of training are solved.

It is hoped that the recommendations made in this research paper will help develop School Management Teams to skills of facilitating transfer of training among educators in their respective schools. The SMT is a key role player in ensuring that training is transferred to the workplace. It is, therefore, fitting to continuously undertake research studies on this subject.

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APPENDIX   A

QUESTIONNAIRE
PROBLEMS EXPERIENCED BY THE SMTs IN FACILITATING
TRANSFER OF TRAINING IN SCHOOLS

INSTRUCTIONS

1. **Please note that the questionnaire is strictly intended for research**

    purposes.

2. **Please follow carefully the instructions given under each question.**

3. **Please ensure that you answer all questions.**

4. **Do not enter your name or the name of the school.**

5. **All information will be dealt with in a confidential manner.**

6. **Please give frank and honest opinions.**

P.T.O for Section A

SECTION A: BIOGRAPHIC AND DEMOGRAPHIC INFORMATION

Please complete the following general questions by drawing a cross (X) in the appropriate box.

A1 Age:

21 – 30	1
31 – 40	2
41 – 50	3
51 – 60	4
61 +	5

A2 Gender:

Male	1
Female	2

A3 Highest Professional Qualification:

PTC	1
PTD	2
STD / SED	3
UED	4
UDE	5
(OTHERS SPECIFY)	

A4 Highest Academic Qualification:

STD 10 / GRADE12	1
Bachelors Degree	2
Honours Degree	3
Masters Degree	4
Doctoral Degree	5

A5 Number of years as principal or HOD:

01 – 03	1
04 – 06	2
07 – 09	3
10 +	4

A6 Number of years in the current school

01 – 03	1
04 – 06	2
07 – 09	3
10 +	4

A 7 Position held at the school

Principal	
Deputy principal	
Head of Department	
Senior teacher	
Educator PL 1	

A8 Phase presently teaching

Primary	
Secondary	

A9 School situation

Rural	
Urban	

P.T.O for Section B

SECTION B
TRAINING PROBLEMS RELATED TO EDUCATORS

School management teams experience numerous problems with regard to assisting educators to apply what they have learned at training in their work. The aim of this section is to determine the degree of seriousness of these problems.

Please indicate your opinion by putting a cross (X) on the scale of 1 – 4 the degree of seriousness to which you experience the following problems in your school as an SMT member

Scale: 1= Not at all   2= Not serious   3= Serious   4= Very serious

As an SMT member in my school, I experience the following problems concerning educators as trainees..........	Not at all	Not serious	Serious	Very serious
	1	2	3	4
B1	..educators lack confidence in their ability to use newly learned skills in their work				
B2	..educators fear to try out newly learned skills in their teaching practice				
B3	..educators who are back from training are reluctant to give training to those who did not attend training				
B4	..educators who are back from training fail to give feedback to those who did not attend training				
B5	..educators do not choose training courses they wish to attend but are assigned to specific training courses				
B6	...educators feel that knowledge and skills gained at training are not relevant to their situation of educators				
B7	...educators lack skills to match what has been learned at training with their everyday teaching duties				
B8	...educators have no interest in in-service training courses				
B9	..educators have no inputs in the content of the training programme				
B10	...educators feel that their teaching work suffers (falls behind) while they attend training courses				

P.T.O for Section C

SECTION C
TRAINING PROBLEMS RELATED TO THE WORK ENVIRONMENT

School management teams experience problems with regard to the school environment that does not encourage educators to apply skills and knowledge gained in training at their work situation. This section aims at determining the seriousness of these problems.

Please indicate your opinion by putting a cross (X) on the scale of 1 – 4 the degree of seriousness to which you experience the following problems in your school as an SMT member.

Scale: 1= Not at all   2= Not serious   3= Serious   4= Very serious

As a member of the school management team (SMT), I experience the following problems	Not at all	Not serious	Serious	Very serious
	1	2	3	4
C1....enabling educators to support group norms for improvement and upholding of high standards				
C2...organising meetings for feedback from those who have been trained				
C3 ....organising meetings for trained educators to train others in the school				
C4...motivating educators who have undergone training to use the newly learned skills				
C5...assisting educators in identifying situations where the newly gained skills can be applied				
C6...provides opportunities for educators to perform learned behaviour, knowledge and skills in the school.				
C7...providing resources that educators need to apply their newly gained skills				
C8...obtaining assistance from the course leaders and subject advisors to give in-school support to trained educators				
C9...giving incentives to educators for practising skills learned in training				
C10...providing time for professional development activities within the regular school day				

Thank you for your participation and support
God bless!!!!!!!!!

APPENDIX B : ETHICS LETTER

NORTH-WEST UNIVERSITY
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ETHICS APPROVAL OF PROJECT

Ethics Committee
Tel +27 18 299 4850
Fax +27 18 293 5329
Email Ethics@nwu.ac.za

2010-08-03

This is to certify that the next project was approved by the NWU Ethics Committee:

Project title : PROBLEMS EXPERIENCED BY THE SCHOOL
MANAGEMENT TEAM IN FACILITATING TRANSFER OF
TRAINING

Student : H Madimabe
Project leader: Prof J Mosoge
Ethics
number: **NWU-00026-10-A2**

Expiry date: 2015/07/21

The Ethics Committee would like to remain at your service as scientist and researcher, and wishes you well with your project. Please do not hesitate to contact the Ethics Committee for any further enquiries or requests for assistance.

The formal Ethics approval certificate will be sent to you as soon as possible.

Yours sincerely

Me.Marietjie Halgryn
NWU Ethics Secretariate

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APPENDIX C : REQUEST TO CONDUCT RESEARCH

NORTH-WEST UNIVERSITY
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Web: http://www.nwu.ac.za

School of Education
Tel: (018) 018 2994752
Fax (018) 018 299 4712
EMail Joe.Mosoge@nwu.ac.za

04 August 2010

TO WHOM IT MAY CONCERN

REQUEST TO CONDUCT RESEARCH IN SCHOOLS

This serves to confirm that Mr H. Madimabe (student number) is bona-fide student at the above institution where he is registered for the M.Ed-degree. His research requires that he carries out fieldwork in order to gather data from schools for his mini-dissertation. The title of the mini-dissertation is:

Problems experienced by principals in facilitating transfer of training in schools.

We request you to give him written permission to visit the schools in your area for purposes of distributing and collecting questionnaires from the respondents. Your letter of permission will in no way be used to influence the decision of the respondents either to participate or not participate in this research. Respondents will be requested to participate at their own discretion and volition.

M.J. Mosoge
Supervisor
Professor (Educational management)

H. Madimabe
Candidate

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education

Lefapha la Thuto
Onderwys Departement
Department of Education
NORTH WEST PROVINCE

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Private Bag x 12005
Lichtenburg 2740
Tel: 018 6330800/5
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psokupha@nwpg.gov.za

NGAKA MODIRI MOLEMA DISTRICT
LICHTENBURG AREA OFFICE

TO   :   **MR MADIMABE H.**
ALL PRINCIPALS (ITSOSENG CLUSTER)
ALL PRINCIPALS (BODIBE CLUSTER)

FROM   :   **P.W SOKUPHA**
ITSOSENG CIRCUIT MANAGER

SUBJECT   :   **PERMSSION TO CONDUCT RESEARCH IN**
SCHOOLS

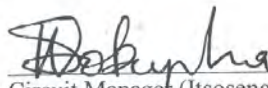Kindly note that Mr Madimabe H. has been granted permission to conduct his M .ED-degree research in your school.

The title of his mini-dissertation is:

Problems experienced by principals in facilitating transfer of training in schools.

In the light of the above your cooperation in this regard will be highly appreciated.

Thanking you without prejudice

Circuit Manager (Itsoseng and Bodibe)
P W Sokupha

APPENDIX E : INFORMED CONSENT LETTER

NORTH-WEST UNIVERSITY
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EMail Joe.Mosoge@nwu.ac.za

19/ 2008

Dear Sir /Madam

TO WHOM IT MAY CONCERN: INFORMED CONSENT LETTER

Mr. H. MADIMABE (Student No. 118831448) is registered for M.Ed at the above university and that he is currently engaged in research on the topic "Problems experienced by the school management team in facilitating transfer of training among educators".

Mr. Madimabe is doing field work for the above research. This consists of a questionnaire which he requests you to complete to the best of your ability. Kindly note that you will complete this questionnaire at your own free will and can withdraw at any stage during this process: before, during and after completing the questionnaire. You are requested to remain anonymous by not filling in your name or the name of your school on the questionnaire and, although you are requested to indicate your name on this letter of consent, your responses will in no way be connected to your name. A general report about the results of the research will be written where an overall response of the group as a whole will be reflected.

We assure you that all information will be handled with confidentiality as no other parties will be allowed access to the raw data except for the Statistical Consultation Service of the University of the North West. Copies of the completed dissertation will be made available to the North West Department of E Education where respondents can peruse it.

Thanking you in anticipation

Yours sincerely

M.J. Mosoge   H. Madimabe
Professor: Educational Management and Leadership   Student

SIGNATURES

Respondent's name: (Print, please)...

Signature of respondent...

Witness' signature...

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APPENDIX   F :   LANGUAGE EDITING

Loqua

Leona Labuschagne   www.loquat.co.za
SATI-accredited translator and conference interpreter
Professional writer, copy editor and proofreader
Sworn translator of SA High Court

E-mail: leona@loquat.co.za
Mobile: 083 302 2632

TO WHOM IT MAY CONCERN

I, Leona Anita Labuschagne, currently residing at 45 Alan Drive, Walmer Downs, Port Elizabeth, South Africa, hereby declare that I am a professional language practitioner qualified to edit academic theses, book manuscripts, legal documents and various other kinds of written material on subjects that fall within my field of expertise.

This letter serves to confirm **that** the dissertation on Training Transfer submitted by Mr >>>> Madimabe, Student Number >>>>>>>>>>>, Faculty of Education, North West University, in part fulfilment of the >>>>>>>>> degree has been edited by me, and **that**, to the best of my knowledge and ability, the language in the dissertation is now correct, clear, understandable and academically appropriate.

Signed at Port Elizabeth on Thursday 18 November 2010.

Leona Anita Labuschagne
Identification number 520402 0036 08 6

Caveat: Because an electronic signature can easily be copied, the signature above is not legally binding unless acknowledged and endorsed in writing by the signatory.

Important Notice: SATI protects public, too

The accreditation of members of the South African Translators' Institute (SATI) is controlled by that body. This also protects you, as a member of the public, in that you have the right to request SATI to investigate if you are of the opinion that you have been exploited by one of its members. It is therefore to your advantage to insist on having work done by a SATI member, preferably an **accredited** SATI member.

* According to the *International Organisation for Standardisation (ISO)* every language has a two-code made up the first two letters of the original name of that language, e.g. de (lower case) refers to German (Deutsch).