Making Employee Training Stick
An Interactive Program for Supervisors

Terry McQuown & Andrew Sanderbeck
Washington Library Association
2017 Annual Conference
November 4, 2017
Who We Are

Terry McQuown
Staff Development Coordinator
King County Library System
tpmcquown@kcls.org

Andrew Sanderbeck
Founder, People Connect Institute
andrew@peopleconnectinstitute.com
http://www.pciwebinars.com/
Where we’re going

- Why you need to be involved
- How you think about training matters
- What you can do to make training stick
- Getting started with transfer of training
Where Are You Stuck?
Where we’re going

Why you need to be involved

How you think about training matters

What you can do to make training stick

Getting started with transfer of training
Three Important Stakeholders

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Before</th>
<th>During</th>
<th>After</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor</td>
<td>?</td>
<td>?</td>
<td>?</td>
</tr>
<tr>
<td>Trainer</td>
<td>?</td>
<td>?</td>
<td>?</td>
</tr>
<tr>
<td>Trainee</td>
<td>?</td>
<td>?</td>
<td>?</td>
</tr>
</tbody>
</table>

Adapted from Broad & Newstrom (1992), p. 52
### Three Important Stakeholders

Adapted from Broad & Newstrom (1992), p. 54

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Before</th>
<th>During</th>
<th>After</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor</td>
<td>1</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>Trainer</td>
<td>2</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td>Trainee</td>
<td>7</td>
<td>5</td>
<td>6</td>
</tr>
</tbody>
</table>
Transfer Model

- **Organizational Level**
  - Characteristics of the Work Environment

- **Learning Field Level**
  - Characteristics of the Training Measure

- **Individual Level**
  - Characteristics of Participants

**Effectiveness of Training Measure**
- Skill expansion
- Transfer of Training
- Organizational Success
  - Short term
  - Mid and long term
  - Long Term

Adapted from Tonhauser & Buker (2016), p. 129
**Organizational Level**

- **Follow-up**
  - After-action reviews
  - Feedback
  - Job Aids
- **Social Support**
  - Supervisor support
  - Peer support
- **Structural & Organizational Circumstances**
  - Accountability
  - Opportunity to use
  - Strategic link
  - Transfer climate
    - Situational cues prompting use
    - Consequences for using
    - Remediation for not using
  - Variability of work tasks

*Based on Tonhauser & Buker (2016), Salas et al. (2012), Grossman & Salas (2011), Blume et al. (2010), Burke & Hutchins (2008), Burke & Hutchins (2007)*
Transfer Model Cont.

Individual Level

- Cognitive ability
- Commitment to organization
- Goal orientation
- Job involvement
- Motivation
  - Learning motivation
  - Training motivation
  - Transfer motivation
- Perceived utility
- Understand learning objectives
- Self-efficacy
- Voluntary participation

the role of supervisors in influencing and supporting trainee transfer has been widely supported in both empirical and qualitative studies

Burke & Hutchins (2007), p. 281
Where we’re going

1. Why you need to be involved
2. How you think about training matters
3. What you can do to make training stick
4. Getting started with transfer of training
How Many See Training

Start

Training Event

Finish
Where Is Your Focus?

too many organizations are focused on the wrong finish line

Weber (2014), p. 28
Evaluation Of Training

Based on Kirkpatrick & Kirkpatrick (2006)
Your Last Training

1. Reaction
2. Learning
3. Behavior
4. Results

Where did it land?
Based on Kirkpatrick & Kirkpatrick (2016), p. 50
What Leads To Learning Scrap?
Training Is A Process

Before Training

During Training

After Training
The Real Finish Line

- Before Training
- During Training
- After Training

Finish

Behavior & Results
Transfer of Training

the effective and continuing application, by trainees to their job, of the knowledge and skills gained in training

Broad & Newstrom (1992), p. 6
Why you need to be involved

How you think about training matters

What you can do to make training stick

Getting started with transfer of training
Training Is Not A Silver Bullet

not all perceived needs for training and coaching can in fact be resolved or addressed by training

Carnes (2010), p. 4
Determine the Need For Training

Desired Results
- Actual Results

Desired Behaviors
- Actual Behaviors

Gap Analysis:
- Organizational level
- Process level
- Individual level

Intervention:
- Culture change
- Job redesign
- Training (KSAs)
- Other solution(s)

Evaluation

Implementation

Adapted from Broad (2005), p. 58
Three Key Topics

1. What your staff member learned
2. How your staff member will apply it on the job
3. How you can support your staff member
What Your Staff Learned

- Reaction
- Learning
- Behavior
- Results
How Your Staff Will Apply It On The Job

- Reaction
- Learning
- Behavior
- Results
## Getting to Know Bob

<table>
<thead>
<tr>
<th>Training Ideas</th>
<th>Application</th>
<th>Support Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>(what I learned in training)</td>
<td>(how I will use this on the job)</td>
<td>(how my supervisor can help me)</td>
</tr>
<tr>
<td>What I learned in training that I will use on the job</td>
<td>How I will use this learning on the job</td>
<td>The steps I will take to use this learning on the job</td>
</tr>
<tr>
<td>-----------------------------------------------------</td>
<td>----------------------------------------</td>
<td>---------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Why I want to use this learning on the job</td>
<td>The obstacles I see to using this learning on the job</td>
<td>How I will overcome these obstacles</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
No Single Thing

supervisory support is clearly a multidimensional construct

Multidimensional

Bob

Rope

Nora
Support *Before* Training

by meeting with your direct report before training, you underscore the importance you place on getting a return for the time and money that will be invested, and you help your direct report focus on the most valuable elements of the program.

Jefferson, Pollock, & Wick (2009), p. 15
Support *Before* Training

ROPE

- Relevance
- Objectives
- Expectations
- Prepare Trainee
Support After Training

Supervisors represent a potentially powerful influence for most workers, and only through individual coaching contacts can they ensure that transfer will occur.

Broad & Newstrom (1992), p. 65
Support After Training

NORA

Next Steps

Accountability

Obstacles

Resources
# Transfer of Training Checklist

<table>
<thead>
<tr>
<th>Transfer of Training Checklist</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong></td>
</tr>
<tr>
<td><strong>Training:</strong></td>
</tr>
<tr>
<td><strong>Date:</strong></td>
</tr>
</tbody>
</table>

### Before Training
- Meeting Date:
  - Reference
  - Objectives
  - Prepare Training
    - Goal Orientation
    - Self-Efficacy
  - Expectations

### During Training
- Provide Time and Resources
- Avoid Interruptions

### After Training
- Meeting Date:
  - Next Steps
  - Obstacles
  - Resources Needed
  - Accountability

Follow-Up Meeting(s):
CONTINUOUS LEARNING

Optional Pre-meeting Prep:


Note: These optional materials are meant to give you a general understanding of the topic + the opportunity to learn along with your staff member. Please be assured you are NOT expected to be a content expert!

Discussion Questions:

1. What was your Key Takeaway from class?
2. How might this apply to your Learning Goal?
3. How might you share what you’re learning with your team? [If appropriate]
4. Do you have enough time to complete your assignments?

How can I best support you until we meet again?

Our next touch base meeting will be:
## Transfer of Training Stakeholder Matrix (Supervisor)

<table>
<thead>
<tr>
<th>Actions Before Training</th>
<th>Actions During Training</th>
<th>Actions After Training</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Conduct an analysis of your staff’s training needs</strong></td>
<td><strong>Provide time and resources for staff to attend the training</strong></td>
<td><strong>Review staff’s Learning &amp; Application Worksheet</strong></td>
</tr>
<tr>
<td><strong>Involve staff in determining their training needs</strong></td>
<td><strong>Prevent staff from being interrupted while at the training</strong></td>
<td><strong>Discuss what was learned in the training program</strong></td>
</tr>
<tr>
<td><strong>Help staff recognize their training needs</strong></td>
<td><strong>Have the work of the staff member covered during the training</strong></td>
<td><strong>Discuss how the learning will be applied on the job</strong></td>
</tr>
<tr>
<td><strong>Identify appropriate trainings or other resources that meet staff needs</strong></td>
<td><strong>Communicate support for the training</strong></td>
<td><strong>Reiterate the relevance and benefits of the training</strong></td>
</tr>
<tr>
<td><strong>Authorize staff to register for appropriate trainings</strong></td>
<td><strong>Monitor attendance of staff who attend the training</strong></td>
<td><strong>Reiterate the training’s objectives</strong></td>
</tr>
<tr>
<td><strong>For required trainings, notify staff in a positive way the reasons why they will be taking the training</strong></td>
<td><strong>Throughout the Process</strong></td>
<td><strong>Reconnect the training to the strategic goals of the organization</strong></td>
</tr>
<tr>
<td><strong>Approve appropriate requests for Individual Development funding for non-library trainings</strong></td>
<td><strong>Support and openly value participation in training</strong></td>
<td><strong>Discuss your expectations for staff to transfer training to the job</strong></td>
</tr>
<tr>
<td><strong>Inform Staff Development of perceived skill or knowledge gaps (if you are unable to locate appropriate trainings or other resources)</strong></td>
<td><strong>Recognize staff participation in training</strong></td>
<td><strong>Assist staff member in creating next steps to apply learning on the job</strong></td>
</tr>
<tr>
<td><strong>Provide staff with Learning &amp; Application Worksheet</strong></td>
<td><strong>Be open to new ideas</strong></td>
<td><strong>Explore anticipated barriers to transfer and possible countermeasures</strong></td>
</tr>
<tr>
<td><strong>Discuss what staff hopes to learn in training</strong></td>
<td><strong>Tolerate change and mistakes</strong></td>
<td><strong>Remove barriers to applying learning on the job</strong></td>
</tr>
<tr>
<td><strong>Discuss how the learning will be applied at work</strong></td>
<td><strong>Throughout the Process</strong></td>
<td><strong>Talk with Staff Development about barriers actually preventing transfer of training to the job</strong></td>
</tr>
<tr>
<td><strong>Discuss the relevance and benefits of the training</strong></td>
<td><strong>Provide time and opportunities to apply learning</strong></td>
<td><strong>Provide equipment, materials, and supplies needed to apply learning</strong></td>
</tr>
<tr>
<td><strong>Discuss the training’s objectives</strong></td>
<td><strong>Demonstrate confidence in staff’s ability to complete the training and apply it on the job</strong></td>
<td><strong>Provide check-ins to communicate support</strong></td>
</tr>
<tr>
<td><strong>Connect the training to the strategic goals of the organization</strong></td>
<td><strong>Demonstrate confidence in staff’s ability to complete the training and apply it on the job</strong></td>
<td><strong>Demonstrate confidence in staff’s ability to complete the training and apply it on the job</strong></td>
</tr>
</tbody>
</table>

Adapted from Broad (2005), Broad & Newstrom (1992)
<table>
<thead>
<tr>
<th>Stakeholder Matrix (Page 2)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Transfer of Training Stakeholder Matrix (Supervisor)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Actions Before Training</strong></td>
</tr>
<tr>
<td>Help staff focus on mastering new knowledge and skills</td>
</tr>
<tr>
<td>Encourage active participation while in training</td>
</tr>
<tr>
<td>Work with staff to increase job involvement and organisational commitment</td>
</tr>
<tr>
<td>Attend training and/or review class materials to familiarize yourself with training content</td>
</tr>
<tr>
<td>Demonstrate interest in staff’s learning</td>
</tr>
<tr>
<td>Model appropriate skills and behaviors on the job</td>
</tr>
<tr>
<td>Provide time and resources to complete any pre-training assignments</td>
</tr>
<tr>
<td>Assist with staff’s preparation for training as appropriate</td>
</tr>
<tr>
<td>Select staff to attend together (they can support each other with transfer as “training buddies”)</td>
</tr>
<tr>
<td>Become familiar with coaching skills to assist with post-training transfer of learning to the job</td>
</tr>
<tr>
<td>Establish a space in your Cluster Notebook where staff can post training related information</td>
</tr>
<tr>
<td>Talk with Staff Development about perceived barriers to transfer of training to the job</td>
</tr>
<tr>
<td>Complete any pre-training evaluations of staff</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Adapted from Broad (2005), Broad & Newstrom (1992)
Are Results Improved?

- Reaction
- Learning
- Behavior
- Results
Was Training Really the Answer?

Desired Results
Actual Results

Desired Behaviors
Actual Behaviors

Gap Analysis:
• Organizational level
• Process level
• Individual level

Intervention:
• Culture change
• Job redesign
• Training (KSAs)
• Other solution(s)

Evaluation
Implementation

Adapted from Broad (2005), p. 58
Where we’re going

- Why you need to be involved
- How you think about training matters
- What you can do to make training stick
- Getting started with transfer of training
What’s Stopping You?

Obstacles

Countermeasures
What’s In It For ...

You

Your Staff

Your Organization
Thank You!

Ensure you are incorporating learning transfer. Hope is not a method.

Sources


Sources Continued


<table>
<thead>
<tr>
<th><strong>Transfer of Training Stakeholder Matrix (Supervisor)</strong></th>
<th><strong>Actions Before Training</strong></th>
<th><strong>Actions During Training</strong></th>
<th><strong>Actions After Training</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Conduct an analysis of your staff’s training needs</strong></td>
<td>Provide time and resources for staff to attend the training</td>
<td>Review staff’s <em>Learning &amp; Application Worksheet</em></td>
<td><strong>Review staff’s <em>Learning &amp; Application Worksheet</em></strong></td>
</tr>
<tr>
<td><strong>Involve staff in determining their training needs</strong></td>
<td>Prevent staff from being interrupted while at the training</td>
<td>Discuss what was learned in the training program</td>
<td><strong>Discuss what was learned in the training program</strong>*</td>
</tr>
<tr>
<td><strong>Help staff recognize their training needs</strong></td>
<td>Have the work of the staff member covered during the training</td>
<td>Discuss how the learning will be applied on the job</td>
<td><strong>Discuss how the learning will be applied on the job</strong>*</td>
</tr>
<tr>
<td><strong>Identify appropriate trainings or other resources that meet staff needs</strong></td>
<td>Communicate support for the training</td>
<td>Reiterate the relevance and benefits of the training</td>
<td><strong>Reiterate the relevance and benefits of the training</strong>*</td>
</tr>
<tr>
<td><strong>Authorize staff to register for appropriate trainings</strong></td>
<td>Monitor attendance of staff who attend the training</td>
<td>Reiterate the training’s objectives</td>
<td><strong>Reiterate the training’s objectives</strong>*</td>
</tr>
<tr>
<td><strong>For required trainings, notify staff (in a positive way) the reasons why they will be taking the training</strong></td>
<td><strong>Throughout the Process</strong></td>
<td>Reconnect the training to the strategic goals of the organization</td>
<td><strong>Reconnect the training to the strategic goals of the organization</strong>*</td>
</tr>
<tr>
<td><strong>Approve appropriate requests for Individual Development funding for non-KCLS trainings</strong></td>
<td></td>
<td><strong>Discuss your expectations for staff to transfer training to the job</strong>*</td>
<td><strong>Discuss your expectations for staff to transfer training to the job</strong>*</td>
</tr>
<tr>
<td><strong>Inform Staff Development of perceived skill or knowledge gaps (if you are unable to locate appropriate trainings or other resources)</strong></td>
<td></td>
<td><strong>Assist staff member in creating next steps to apply learning on the job</strong>*</td>
<td><strong>Assist staff member in creating next steps to apply learning on the job</strong>*</td>
</tr>
<tr>
<td><strong>Provide staff with <em>Learning &amp; Application Worksheet</em></strong>**</td>
<td><strong>Support and openly value participation in training</strong>*</td>
<td><strong>Explore anticipated barriers to transfer and possible countermeasures</strong>*</td>
<td><strong>Explore anticipated barriers to transfer and possible countermeasures</strong>*</td>
</tr>
<tr>
<td><strong>Discuss what staff hopes to learn in training</strong></td>
<td><strong>Recognize staff participation in training</strong>*</td>
<td><strong>Remove barriers to applying learning on the job</strong>*</td>
<td><strong>Remove barriers to applying learning on the job</strong>*</td>
</tr>
<tr>
<td><strong>Discuss how the learning will be applied at work</strong></td>
<td><strong>Be open to new ideas</strong>*</td>
<td><strong>Talk with Staff Development about barriers actually preventing transfer of training to the job</strong>*</td>
<td><strong>Talk with Staff Development about barriers actually preventing transfer of training to the job</strong>*</td>
</tr>
<tr>
<td><strong>Discuss the relevance and benefits of the training</strong></td>
<td><strong>Tolerate change and mistakes</strong>*</td>
<td><strong>Provide time and opportunities to apply learning</strong>*</td>
<td><strong>Provide time and opportunities to apply learning</strong>*</td>
</tr>
<tr>
<td><strong>Discuss the training’s objectives</strong></td>
<td><strong>Set expectations for learning and application</strong>*</td>
<td><strong>Provide equipment, materials, and supplies needed to apply learning</strong>*</td>
<td><strong>Provide equipment, materials, and supplies needed to apply learning</strong>*</td>
</tr>
<tr>
<td><strong>Connect the training to the strategic goals of the organization</strong></td>
<td><strong>Demonstrate confidence in staff’s ability to complete the training and apply it on the job</strong>*</td>
<td><strong>Provide check-ins to communicate support</strong>*</td>
<td><strong>Provide check-ins to communicate support</strong>*</td>
</tr>
<tr>
<td><strong>Set expectations for learning and application</strong></td>
<td><strong>Demonstrate confidence in staff’s ability to complete the training and apply it on the job</strong></td>
<td></td>
<td><strong>Demonstrate confidence in staff’s ability to complete the training and apply it on the job</strong></td>
</tr>
</tbody>
</table>
## Transfer of Training Stakeholder Matrix (Supervisor)

<table>
<thead>
<tr>
<th>Actions Before Training</th>
<th>Actions During Training</th>
<th>Actions After Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help staff focus on mastering new knowledge and skills</td>
<td>Assure staff that lapses may occur and are not a sign of failure</td>
<td>Demonstrate understanding if problems arise in the transfer of training</td>
</tr>
<tr>
<td>Encourage active participation while in training</td>
<td>Demonstrate understanding if problems arise in the transfer of training</td>
<td>Provide relevant job aids and other supportive resources</td>
</tr>
<tr>
<td>Work with staff to increase job involvement and organizational commitment</td>
<td>Provide relevant job aids and other supportive resources</td>
<td>Provide timely, relevant, and consistent feedback</td>
</tr>
<tr>
<td>Attend training and/or review class materials to familiarize yourself with training content</td>
<td>Continue to model appropriate skills and behavior on the job</td>
<td>Continue to express interest in staff’s learning</td>
</tr>
<tr>
<td>Demonstrate interest in staff’s learning</td>
<td>Reward, recognize, and celebrate successful application of learning on the job</td>
<td>Provide relevant job aids and other supportive resources</td>
</tr>
<tr>
<td>Model appropriate skills and behaviors on the job</td>
<td>Publicize successes resulting from the learning gained at training</td>
<td>Provide timely, relevant, and consistent feedback</td>
</tr>
<tr>
<td>Provide time and resources to complete any pre-training assignments</td>
<td>Provide time and resources for staff to complete any post-training assignments</td>
<td>鼓励参加跟进培训</td>
</tr>
<tr>
<td>Assist with staff’s preparation for training as appropriate</td>
<td>Encourage participation in follow-up training</td>
<td>Have staff teach new learning to other staff members (e.g., at a meeting)</td>
</tr>
<tr>
<td>Select staff to attend together (they can support each other with transfer as “training buddies”)</td>
<td>Have staff mentor other staff members on the new learning gained from training</td>
<td>Have staff mentor other staff members on the new learning gained from training</td>
</tr>
<tr>
<td>Become familiar with coaching skills to assist with post-training transfer of learning to the job</td>
<td>Have staff post information about what was learned in your Cluster Notebook</td>
<td>Complete any pre-training evaluations of staff</td>
</tr>
<tr>
<td>Establish a space in your Cluster Notebook where staff can post training related information</td>
<td>Complete any post-training evaluations of staff</td>
<td></td>
</tr>
<tr>
<td>Talk with Staff Development about perceived barriers to transfer of training to the job</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete any pre-training evaluations of staff</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Learning & Application Worksheet**

<table>
<thead>
<tr>
<th>What I learned in training that I will use on the job</th>
<th>How I will use this learning on the job</th>
<th>The steps I will take to use this learning on the job</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Why I want to use this learning on the job</th>
<th>The obstacles I see to using this learning on the job</th>
<th>How I will overcome those obstacles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

King County Library System  *  Staff Development Department  *  960 Newport Way NW, Issaquah, WA 98027  *  425.369.3220  *  training@kcls.org

*Do not send to the Staff Development Department  *  Keep for your own records
<table>
<thead>
<tr>
<th>What I learned in training that I will use on the job</th>
<th>How I will use this learning on the job</th>
<th>The steps I will take to use this learning on the job</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Why I want to use this learning on the job</td>
<td>The obstacles I see to using this learning on the job</td>
<td>How I will overcome those obstacles</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Transfer of Training Checklist (Supervisor)

| Name: |
| Training: |
| Date: |

### Before Training

**Meeting Date:**

- Relevance
- Objectives
- Prepare Trainee
  - Goal Orientation
  - Self-Efficacy
- Expectations

### During Training

- Provide Time and Resources
- Avoid Interruptions

### After Training

**Meeting Date:**

- Next Steps
- Obstacles
- Resources Needed
- Accountability

Follow-Up Meeting(s):