

# A FOUCAULDIAN READING OF THE TRAIN THE TRAINER LITERATURE

by

AJIT PRASAD BHATTARAI

(Under the Direction of Aliko I. Nicolaides)

## ABSTRACT

This dissertation analyzes the train the trainer literature published by the American Society of Training Directors. Michel Foucault's archaeological analytic was used to conceptualize and design the study and also to interrogate the literature on how subject matter experts are trained to train others. The speaking subjects, although important, were not the focus of this study. The focus was on exploring how various speakers were able to speak what they have spoken about how trainers should be trained. The study was guided by the following questions: 1) In what ways has the train the trainer (TTT) concept been articulated in the ASTD literature? and 2) What conditions of existence have made these articulations possible? The analyses showed that assertions about training trainers in ASTD had been articulated by practitioners, academics, and ASTD office bearers. The articulations on training trainers became possible by classifying and organizing various training objects in multiple ways and relying on concepts like *scientific research* located in the broader social science domain. The author's organizational positions and roles, educational degrees, and work experiences have been implicitly used as the *authority to speak* about different aspects of training trainers. Self-referential and self-legitimizing strategies have been used in discursive circularity to produce truths about training trainers. Three conditions of existence: the tension between ASTD, human

resource development (HRD), and psychology around research; the influence of economic rationalities; and ubiquity of scientific management and universal claims have made it possible for the articulations on training trainers to be made in ASTD. Findings indicate the pervasive influence of market-based rationality and the modern episteme in ASTD's train the trainer literature and that traces of positivism and neoliberalism have surreptitiously helped construct the train the trainer materials. The study concludes that train the trainer literature, a seemingly mundane and harmless concept, helps reproduce neoliberal trainers.

INDEX WORDS: train the trainer, subject matter expert, Michel Foucault, archaeology, American Society of Training Directors, Association for Talent Development

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## DEDICATION

To all my Trainees I have met ... and who inspired this journey

To my Grandmothers ... for showing how a life should be lived

To my Parents ... for supporting each and every life changing decision of mine, however  
disorienting

To my Wife ... for being a friend and showing what courage means

To my Siblings ... for being there

To my In-laws ... for continued support

To Avi, Amu, and Sylvia ... for brining unlimited joy.

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## TABLE OF CONTENTS

	Page
ACKNOWLEDGEMENTS .....	v
LIST OF TABLES .....	x
LIST OF FIGURES .....	xi
CHAPTER	
1 INTRODUCTION .....	3
Training & Development – Billion Dollar Industry .....	3
Emergence of T&D .....	4
T&D Scholarship .....	4
Statement of the Problem .....	10
Purpose of the Study .....	12
Significance .....	12
Disclaimers: What This Dissertation is Not About .....	14
2 REVIEW OF THE LITERATURE .....	15
Introduction .....	15
Definition of Training and Development .....	15
Background of T&D .....	16
An Overview of T&D Scholarship .....	29
Paradigms .....	37
Transfer of Training .....	59

Subject Matter Experts as Trainers.....	61
Train the Trainer.....	67
Summary.....	72
3 FOUCAULDIAN HISTORIOGRAPHICAL ANALYTICS .....	73
Poststructuralism .....	73
Michel Foucault-Historian of Thought.....	80
Archaeology .....	82
Genealogy.....	86
Emergence of My Research Interest.....	91
The Discourse of Training & Development .....	92
Archaeology is Not a Methodology .....	94
Summary.....	107
4 WHAT IS SAYABLE ABOUT TRAIN THE TRAINER? .....	108
Section 1: Articulations .....	109
Section 2: <i>INFO-LINE</i> .....	131
Section 3: Andragogy – A Foundational Concept.....	143
Summary.....	157
5 ARTICULATIONS AND CONDITIONS OF EXISTENCE .....	159
Section 1: Intersection of ASTD, Psychology, and HRD .....	161
Section 2: Economic Rationalities.....	171
Section 3: Scientific Management, Certainty, and Universal Claims .....	181
Summary.....	186

6	CODA.....	189
	Implications for Theory .....	195
	Implications for Practice.....	198
	Delimitations .....	199
	Recommendations for Future Research.....	199
	Personal Reflections .....	200
	REFERENCES .....	202

## LIST OF TABLES

	Page
Table 1: Historical Training Events Based on Estep (2008) and Steinmetz (1967).....	18
Table 2: Historical ASTD Events.....	23
Table 3: Key Findings from Various Competency Studies.....	31
Table 4: Examples of Empirical Scholarship in T&D Guided by Logical Positivism.....	42
Table 5: Examples of Empirical Scholarship in T&D Guided by Interpretivism .....	49
Table 6: Forty-one Aspects of Trainer Knowledge and Skill.....	64
Table 7: Comparison of Conventional Qualitative and Post-Qualitative Research .....	77
Table 8: Concept of Person in Humanist and Poststructuralist Theories .....	78
Table 9: Articles Discussing Different Aspects of Trainers.....	119
Table 10: Examples of Articles Discussing Different Aspects of SMEs .....	120
Table 11: Examples of Articles Discussing Different Aspects of Training Trainers.....	121
Table 12: Outline of Sample <i>INFO-LINEs</i> .....	133
Table 13: Table of Contents of Train the Trainer Collection.....	134
Table 14: Example of Authors being Cited in <i>INFO-LINE</i> .....	139

## LIST OF FIGURES

	Page
Figure 1: Timeline of Training Format and Practices .....	22
Figure 2: ASTD’s 2013 Competency Model.....	35
Figure 3: USG’s usage of ASTD’s Competency Model .....	36
Figure 4: Modules in ATD’s Train the Trainer course.....	71
Figure 5: Extract of Introduction in INFO-LINE .....	136
Figure 6: Nadler’s Book Review .....	166

## Preamble

*As for what motivated me, it is quite simple; I would hope that in the eyes of some people it might be sufficient in itself. It was curiosity -- the only kind of curiosity, in any case, that is worth acting upon with a degree of obstinacy: not the curiosity that seeks to assimilate what it is proper for one to know, but that which enables one to get free of oneself. After all, what would be the value of the passion for knowledge if it resulted only in a certain amount of knowledgeableness and not, in one way or another and to the extent possible, in the knower's straying afield of himself? There are times in life when the question of knowing if one can think differently than one thinks, and perceive differently than one sees, is absolutely necessary if one is to go on looking and reflecting at all . . . But, then, what is philosophy today -- philosophical activity, I mean - if it is not the critical work that thought brings to bear on itself? In what does it consist, if not in the endeavor to know how and to what extent it might be possible to think differently, instead of legitimating what is already known.*  
(Foucault, 1984/1985, pp. 8-9)

I spent close to two decades as a commercial banker. After attaining a supervisory position in 2001, in addition to my regular banking responsibilities, I was also required to train other bankers in different banking areas for the next fifteen years. Although I had close to a decade of assessing training needs, designing, delivering, and evaluating training as a subject-matter expert, mainly in the commercial banking training sector, I was formally introduced to the train-the-trainer literature and program only in 2009 in Malaysia. During the next four years, I participated in two additional train-the-trainer programs in India and Nepal. Although an afterthought, I still recall the surprise that, ignoring some superficial issues, that the programs in three different countries delivered by organizations focused on training, banking, and sales were so similar. In all three programs, I was *taught* that as an SME required to train infrequently, I needed to master specific competencies and skills. I was required to learn and master concepts like assessing training needs, designing training by mastering various instructional design skills, learning styles of the participants, and ways of evaluating the training programs. The programs

also continuously emphasized that I was an SME working with adults and hence needed to learn about andragogy, the theory of teaching adults. The programs also continuously emphasized that as an SME working with adults I needed to learn about andragogy, the theory of teaching adults. The materials that were written in crisp, simple, and concise language, provided me everything I needed to learn and master different training concepts. When presented with a framework that supposedly has worked across the world with enough citations thrown in and participating in coursework where numerous co-trainees enthused about the efficacy of learning styles, following adult learning principles, and evaluation strategies, I was *seduced*. To a degree, this realization has come about by being introduced to poststructuralism and more specifically the work of Michel Foucault in my doctoral program at the University of Georgia. I have realized my understandings about training trainers come from an echo chamber. I was speaking the *discourse* with an agentic freewill bounded by the *discourse*. This dissertation was thus *born* out of the “dully jarring” realization of being made a product of a discourse which I had actively reinforced and the desire to explore how such truths and knowledge of training trainers are discursively produced. Similar to everything in this dissertation, this desire was also influenced by Foucault (2000) who had noted:

Every time I have tried to do a piece of theoretical work, it has been on the basis of elements of my own experience: always in connection with processes I saw unfolding around me. It was always because I thought I identified cracks, silent tremors, and dysfunctions in things I saw, institutions I was dealing with, or my relations with others, that I set out to do a piece of work, and each time was partly a fragment of autobiography. (p. 458)

## CHAPTER 1

### INTRODUCTION

#### **Training & Development – Billion Dollar Industry**

A large amount is spent on training and development (T&D) in the United States. A 2019 report by Trainingindustry.com estimated US\$ 366.2 Billion was spent globally on formal training out of which US\$ 166.8 Billion was in North America. Various estimates based on the *Survey of Employer-Provided Training* conducted by the Bureau of Labor Statistics, U.S. Department of Labor in 1995 have also consistently reported a steady rise of training expenses for more than a decade now. Increasingly it is also claimed that, since the U.S. economy is facing an increasing *skills gap* (e.g., Bauman & Christensen, 2018; CEA, 2019), the Federal Government as well as private organizations are planning to spend substantial amounts in training interventions. For example, the Federal Government is spending US\$ 18.9 Billion in 2019 alone on different employment and training programs (CEA, 2019) and in July 2019, Amazon announced that in the next few years it would spend “over \$700 million to provide upskilling training programs for one in three of its employees across the U.S” (Upskilling 2025, n.d.). Further, the U.S. Government’s 2018 Occupational Employment Statistics (OES) survey has projected that training jobs like *Training and development managers* and *Training and development specialists* will “grow faster than the average for all occupations” between the years 2018-2028 (<https://www.bls.gov>), showing that there is sustained interest on T&D in the private sector also.



## **Emergence of T&D**

T&D literature evidences that organizations in the United States have engaged in formally educating their workers for over a century and detailed records of programs known as manual education, trade education, vocational education and industrial education are available from the 19<sup>th</sup> century (Barlow, 1976; Bennett, 1926). There is wide acceptance that the way T&D is currently understood is on account of two key events during World War II (WWII): establishment of the Training within Industry (TWI) project in 1940, which Ruona (2001) has labeled as “one of the most pivotal turning points in the history of training [and] a watershed event in American industry” (pp. 119-120) that allowed industry leaders to appreciate and realize the importance of training; and the formation of the American Society of Training Directors in 1943 (ASTD) (Oakes, 2014). This organization, which subsequently changed its name to the American Society of Training and Development in 1964 and to the Association for Talent Development (ATD) in 2014 has produced hundreds of books, handbooks and has had its own journal and magazine from 1945 onwards.

## **T&D Scholarship**

While there are points of critical divergences between how T&D has been understood and theorized in various fields<sup>1</sup>, it is widely accepted that T&D had been and will continue to be an integral and critical aspect of organizations. Given the large amount spent on T&D, it is thus not surprising that there is a sizeable academic and practitioner/trade literature on T&D. While there existed quite a bit of T&D scholarship before WWII also, the post-WWII period saw an explosion of T&D literature which motivated academics to summarize and critique the T&D literature (Campbell, 1971). The tradition started by Campbell in 1971, where he thematized,

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<sup>1</sup> To be discussed in more detail in Chapter 2.

critiqued and laid down calls for action to researchers continues to this day (e.g., Goldstein, 1980; Wexley, 1984). The earlier T&D reviews, especially those done by Campbell (1971), Goldstein (1980) and Wexley (1984), contained a sustained critique of the non-academic and non-theoretical nature of the T&D literature and made impassioned calls for empirical and theoretical research in T&D.

Pursuant to these seminal calls to action, in the thirty years from Campbell's first review, a voluminous T&D literature especially in the academic journals appeared with "more theories, models, empirical results, reviews, and meta-analyses" (Salas & Cannon-Bowers, 2001, p. 472). Increasing publication of various types of academic literature in the 21<sup>st</sup> century have led to scholars confidently declaring that "there is a science of training that shows that there is a right way and a wrong way to design, deliver, and implement a training program" (Salas et al., 2012, p. 74). While there were no meta-reviews in the practitioner field, the practitioner literature has also seen growth both in terms of quantity and quality. Not only does ATD currently have over 36,000 members spread across more than 120 countries (<https://www.td.org/about/our-history>), similar associations have opened and are successfully operating in many countries of the world (e.g., CIPD, UK). Further, ATD and other similar organizations have not only consistently published numerous highly appreciated handbooks and thousands of articles in various journals and magazines, but they have also come up with various competency standards.

### **Face to Face Training and Trainers**

*"Classroom training is a 19th-century artifact - if not an artifact of the medieval times"*

(Former U.S. Dept. of Labor Secretary Robert Reich as cited in Byham, 2008, p. 295).

In spite of persistent skepticism on the long-term viability of traditional classroom training in the face of technological advancement in content delivery, face-to-face classroom

training led by a trainer has refused to go away. Byham's (2008) prediction that "face-to-face delivery is strong and its prognosis excellent" (p. 298) continues to be true. While organizations can engage in various forms of training (e.g., on the job training, job rotation) and there is evidence that blended forms of training are increasing, a large proportion of training is still provided in trainer led classrooms (Miller, 2013). In their annual State of the Industry report, Association for Talent Development (2018a) stated that 67% of the training is led by instructors and that "companies delivered slightly more than half of the formal learning hours available and used in 2017 via the traditional, live, face-to-face classroom" (p. 43). Further, "a 2018 survey by LinkedIn reported that 85% of the respondents from around the world used "in-house instructor-led classes" to train their employees, up from 75% in 2017" (www.linkedin.com).

Not surprisingly, T&D scholars like Noe et al. (2014) have noted that "formal training context, both in pure and blended forms, remains a relevant field of study" (p. 253) as evidenced by the focus on trainers who conduct the trainings in the T&D scholarship. The research both in the academic and practitioner literature has focused on different aspects of trainers: who they are, what they do, how they should train, how the trainers themselves need to be trained etc. Given that "demand for trained facilitators remains high" (Byham, 2008, p. 298), researchers have looked at what make trainers effective (e.g., Harris et al., 2014; Chukwu, 2016; Ghosh et al., 2012; Kalargyrou & Woods, 2011), what makes trainers credible (e.g., Hassi et al., 2011), how trainers ensure engagement with trainees (e.g., Arghode & Wang, 2016; Beebe, 2007; Brotherton & Evans, 2010; Towler, 2009), and the role of train-the-trainers training in making trainers effective (e.g., Moss, 1997; Kopf & Kreuze, 1991; Sartori et al., 2015), importance and effectiveness of train the trainer programs in training trainers (e.g., Anderson & Taira, 2018; Loo

& Thorpe, 2003; Molinaro et al., 2018; Piñero et al., 2018; Tonna & Bugeja, 2018; Weingarten et al., 2018).

### **Subject Matter Expert as the Trainer**

In organizations, training is conducted by a variety of people: internal/external professionals, internal/external training professionals, subject matter experts (Williams, 2001). Increasingly, organizations require staff members who have expertise in their fields to train other staff members (Hughes & Toohey, 1992; Williams, 2001). These experts, known by various names like accidental trainer (Dumas & Wile, 1992; Weiss, 1997), corporate technical trainer (Mules, 2014), incidental trainer (Hughes & Toohey, 1992), industrial instructor (McGehee & Thayer, 1961), non-professional trainers (Bloom, 2006) are

part time or volunteer educators in an area of expertise that they have made their own over many years. They are not seen and do not regard themselves as specialist trainers, but as subject matter experts called on to train. They may work in-house, on-the-job or in the training room, in the community, or in public educational institutions or private colleges. Training or tutoring is usually a small aspect of their work or volunteer role—they may work as tutors or trainers only rarely and irregularly, or intensively for only a short time while a defined need is being addressed. (Hughes & Toohey, 1992, p. 14)

While use of subject-matter-experts (SME) as trainers is now a widely accepted training practice around the world and across a wide range of professions, sustained academic and practitioner interest in internal experts double-hatting as trainers in the United States was first noticed during World War I and World War II (Estep, 2008; Sleight, 1993).

McCord (1976) noted that one of the key principles that came out of Governmental training experiences in WWI was the acceptance that “training should be done within industry by

supervisors who should be trained how to teach” (p. 36). Estep (2008) noted that this principle was further solidified with the work of Training Within Industry Service of the War Manpower Commission in WWII. Of special interest to the T&D field was the development of

the Job Instructor Program, or JIT. The JIT’s purpose was to teach first- and second-line supervisors how to teach their skills to others. These train the trainer programs came to be known as J programs and expanded to include topics such as human relations, job methods, safety, and program development. (pp. 14-15)

Although the TWI program closed immediately at the end of WWII, it has had a long-lasting influence on how subject matters experts are thought of as trainers and how they are trained. In addition to widespread belief that SMEs have the ability to train other employees, it is also accepted that being a SME is not sufficient to be a successful trainer (Lynton & Pareek, 1967; Johnston, 1999; McLagan, 1989; Williams, 2001) and consequently the SMEs themselves need to be trained on how to train others (Bennett, 1985; Dolney, 1999; Radcliff & Jenkins, 1978) through exposure to train the trainer materials.

### **Subject Matter Expert & Train the Trainer Materials**

Possibly taking TWI’s J programs as the point of departure, the T&D literature in the recent decades has seen a boom on train the trainer materials. Bloom (2006) noted that the train the trainer materials are available in the form of “(1) commercial seminars, (2) books, magazines, and other articles, and (3) programs from schools that may grant certificates or degrees” (p. 65). While academics have addressed the train the trainer concept in research (e.g., Anderson & Taira, 2018; Loo & Thorpe, 2003; Molinaro et al., 2018; Piñero et al., 2018; Tonna & Bugeja, 2018; Weingarten et al., 2018), in academic books (e.g., Noe, 2010) and also provide

certification programs (e.g., Duke University<sup>2</sup>, University of Minnesota<sup>3</sup>, University of Richmond<sup>4</sup>), the academic train the trainer output is overshadowed by the voluminous practitioner literature existing in the form of books, handbooks, and magazine articles. The print literature is further complemented by the large number of expensive commercial seminars offered around the world (e.g., ATD train the trainer course<sup>5</sup>, Bob Pike's train the trainer bootcamp<sup>6</sup>).

Although the size of practitioner and academic literature on train the trainer is not even, both sets of literature share many commonalities: T&D is needed in organizations, T&D efforts bring efficiency; SMEs need to train others and *can* train others provided they themselves are trained on different aspects of training; train the trainer interventions are the appropriate means of training the SMEs and that there are proven ways of training trainers. Another set of commonalities relate to what these train the trainer programs have as content: both the practitioner and academic train the trainer literature put heavy emphasis on adult learning concepts/principles/theories, learning styles, training delivery and methods, instructional system design and evaluation. While there are subtle differences in what these train the trainer materials contain, they espouse very similar content and messages. A large T&D literature (e.g., Anderson & Taira, 2018; Loo & Thorpe, 2003; Molinaro et al., 2018; Pinero et al., 2018; Tonna & Bugeja, 2018; Weingarten et al., 2018) has consistently provided evidence that train the trainer sessions are needed and that trainers who are exposed to/attend train the trainer literature, become

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<sup>2</sup> <https://hr.duke.edu/training/course-offerings>

<sup>3</sup> <https://ccaps.umn.edu/professional-train-trainer-certificate>

<sup>4</sup> <https://robins.richmond.edu/executive-education/public/train-the-trainer.html>

<sup>5</sup> <https://www.td.org/education-courses/accidental-trainer>

<sup>6</sup> <http://store.bobpikegroup.com/train-the-trainer-boot-camp>

successful (Williams, 2001). While there is no current data on what percentage of the SMEs attend academic or commercial train the trainer programs, given how organizations like ATD which have come out with various competency standards for T&D professionals, have tied their train the trainer programs/materials towards meeting the competency standards, it is presumed that a large number of SMEs attend commercial train the trainer programs<sup>7</sup>.

### **Statement of the Problem**

Valentin (2006) mentioned that “mainstream research in management and human resource development (HRD) is dominated by a positivist paradigm” (p. 17). Given that the T&D field is an integral part of HRD (Dilworth, 2003; Marsick & Watkins, 1994; Marquardt & Engel, 1993; McLagan, 1989; McLean & McLean, 2001; Nadler & Nadler, 1991; Swanson, 1995; Watkins, 1989), T&D is also influenced by positivism. Further, the dominant T&D scholarship has a distinctly Western and instrumental flavor, even in scholarship arising out of non-western countries in T&D (e.g., Chukwu, 2016 [Nigeria]; Novillo, 2015 [Ecuador]; Subedi, 2003; 2011 [Nepal]).

While the T&D literature is voluminous, the majority of traditional T&D scholarship by allowing only certain “aesthetic, moral, and political value judgments” (Bové, 1990. p. 51) to be considered "commonsensical" and "normal" (p. 53), have allowed only certain "self-evident" (p. 53) questions to become possible in T&D and certain *truths* about trainer, train the trainer materials and training practices have come to the fore. Per Foucault (1980c), all discourses produce certain

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<sup>7</sup> This presumption is based on my own prior experiences of attending train-the-trainer programs in three different countries and nominating colleagues in those programs. Further, my presumptions have been strengthened by closely monitoring the availability of open seats in various commercial train-the-trainer programs: <https://www.td.org/education-courses/training-certificate>

‘truth’ statements about those discourses which regulate what can be asked, what is asked and how it is asked. Foucault maintained that,

each society has its regime of truth, its ‘general politics’ of truth: that is, the types of discourse which it accepts and makes function as true; the mechanisms and instances which enable one to distinguish true and false statements, the means by which each is sanctioned; the techniques and procedures accord value in the acquisition of truth; the status of those who are charged with saying what counts as true. (p. 133)

Whatever understanding T&D currently has of trainer, train the trainer materials and training practices, they have come from particular discursive practices. Thus, when SMEs who do not or may not necessarily have background in education and psychology learn certain ways of training in the train the trainer programs, they follow it. It might not be far-fetched to argue that the train the trainer regime helps create certain trainer subjectivities and subsequent training practices – while not everything in the train the trainer practices may be completely internalized, these train the trainer programs help model certain ways of training, which look natural and are seemingly effective. Thus train the trainer materials which come out from this dominant literature while appearing natural and commonsensical (Tisdale, 2003) is anything but innocent. Although the concepts, practices and knowledge in T&D are the result of the coming together of certain forms of rationality, agency and causality, reflective of the epistemes<sup>8</sup> existing in various disciplines (Townley, 1993; 2002) during the 20<sup>th</sup> century, the discourse of T&D looks normal and natural because it is:

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<sup>8</sup> Per Foucault episteme is shorthand for the epistemological field of assumptions, expectations, values and beliefs of a society at a particular historical moment.



difficult to think and act outside it. Within the rules of a discourse, it makes sense to say only certain things. Other statements and other ways of thinking remain unintelligible, outside the realm of possibility. (St. Pierre, 2000, p. 485)

Since Foucauldian analysis allows appreciating that concepts, disciplines, institutions, and practices are only productions of specific discourses and not inevitable, natural and commonsensical and therefore open the possibility of thinking, articulating and doing the practice differently (Tisdale, 2003), I engaging in a scholarship that will possibly help me understand the epistemes that provided the “conditions of possibility” (Foucault, 1966/1970, p. 344) for a certain understanding of T&D to come to the fore and also “identify the accidents” (Foucault, 1984a/1971, p. 81) that have led to the evolving understanding about T&D.

### **Purpose of the Study**

The purpose of my inquiry is to engage in a Foucauldian-inspired analysis of ‘practitioner’ training and development literature in the U.S. to explore how it has been able to produce certain truths about trainers and train the trainer programs. More specifically, my research questions are:

1. In what ways has the train the trainer (TTT) concept been articulated in the ASTD literature?
2. What conditions of existence have made these articulations possible?

### **Significance**

Although academics and practitioners in T&D have come to believe in concepts like train the trainer and how trainers should train, there is limited scholarship on trying to understand how these knowledges came into existence. The current T&D beliefs are based on questions that were the result of a “particular network of powerful intellectual and disciplinary expectations” (Bové,

1990, p. 53). The questions that led to the existence of various truths with regards to training including train the trainer programs are domesticated to look natural and innocent and the knowledge produced by these questions including the knowledge production process is projected as “transparent, naturalized, and self-evident” (p. 52). Bové explained that this occurs because when a discourse like T&D is in play, it “draws attention away from itself, from its disciplinary operations and effects-with their promises of reward and assistance-and focuses the attention ... on the need ‘to get the job done’” (p. 52).

Since discourses privilege certain questions and certain questions in T&D have been privileged, certain other questions like the construction of the field have been obscured. Further, the truth regimes in the training discourse through tools like commercial train-the-training programs create certain subject positions and training subjectivities that continue to propagate the dominant training practices not only in the U.S. but around the world.

Scholars like Trehan (2004) have stated that poststructural theorization in fields like T&D/management education could possibly help practitioners resist the unquestioned acceptance of “roles traditionally expected of them” and “assist them in engaging with the social and moral issues inherent within existing management practice and to become more conscious of the ideological forces which constrain their actions” (p. 35). Thus, by engaging in this inquiry, I hope to pedagogically raise awareness of the effect of history on shaping who SMEs are and how SMEs think of themselves when exposed to train the trainer literature.

**Disclaimers: What This Dissertation is Not About<sup>9</sup>**

- I am not denying the existence of T&D field. Rather given it is a living field with material effects, I am interested in how the T&D field has been produced, what it has produced, how T&D produces SMEs, train the trainer literature and training practices.
- The purpose of this dissertation is not to reject or destroy the T&D field or train the trainer literature and artifacts. It is to open up space in contemporary writings of T&D such that trainer, train the trainer artifacts and training practice can be thought of, articulated and done differently in future.

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<sup>9</sup> Based on Tisdale (2003)

## CHAPTER 2

### REVIEW OF THE LITERATURE

#### **Introduction**

The purpose of my inquiry is to engage in a Foucauldian analysis of ‘practitioner’ training and development literature in the U.S. to understand how it has been able to produce certain truths about trainers and train the trainer programs. Scholars (e.g., Collins, 2013; Tisdale, 2003) have noted that one of the initial steps in a Foucauldian inquiry requires gaining an in-depth but conventional understanding of the concept under study. Thus, in this chapter, I am reporting my understanding of the training and development field in the United States by discussing its background along with how and what has been researched in the T&D field including concepts like subject matter expert.

#### **Definition of Training and Development**

The terms training and development often appear together; some use them interchangeably; others claim they are different. Training is said to be related with activities that aim to equip persons with specific skills and knowledge targeted to adequately perform a particular job immediately or in the near future (Armstrong, 2006; Fairfield & James, 1987; Hackett, 1997). Training can be defined as implementing planned and systematic activities designed to promote the acquisition of knowledge, skills and attitudes that are expected to improve trainees’ performance in a specific environment (Salas et al., 2012). Development is used to refer to future and longer-term development of people throughout their career (Armstrong, 2006; Currie, 2006; Fairfield & James, 1987; Garavan et al., 1995; Hackett, 1997;

Nadler, 1974). On the other hand, some scholars have referred to T&D as the planned process that aims to maintain and improve employees' current and future performance by enhancing their ability to perform, changing their attitudes or increasing their skills and knowledge to improve the employees' and organization's overall effectiveness (Buckley & Caple, 1990). Training and development activities are also understood to be belonging to formal learning that is typically highly structured, institutionally supported, and occurring in classrooms in contrast to informal learning at work (Marsick & Watkins, 2001).

Research suggests that organizational training is one of the most pervasive and potentially potent methods of enhancing individual productivity and organizational effectiveness (Bell & Ford, 2007). Training is said to empower organizations and ensure that they are able to adapt, compete, innovate and reach their goals (Salas et al., 2012). Combs et al. (2006) have noted that effective training certainly has the potential to increase knowledge, skills, and abilities and to enable employees to leverage their acquired knowledge, skills and abilities for organizational benefit. Scholars have argued that since training provides employees with the knowledge and skills to perform more effectively, training positively affects productivity, quality, labor turnover (Aragon-Sanchez et al., 2003) which in turn results in organizations being run efficiently in financial terms. By providing training and development for their employees, organizations try to increase their performance and ensure their continued success (Aguinis & Kraiger, 2009; Blume et al., 2010).

### **Background of T&D**

From time immemorial, human beings have involved themselves in different learning endeavors and in transmitting knowledge and/or skills to others (Estep, 2008; Nadler, 1992; Oakes, 2014; Sleight, 1993; Swanson & Torracco, 1994; Torracco, 2016). For some scholars

(Estep, 2008; Oakes, 2014), learning in a person's life is not that different from breathing; it is something fundamental that humans have been doing forever and will continue to do. Although human beings have always been involved in transmitting knowledge and/or skills for the longest of times, it is with the dawn of the industrial revolution in the mid-eighteenth century that training started to be organized in a conscious and formal manner. With Western economies making the tectonic shift from the agrarian age to the industrial age, new forms of knowledge and/or skills transmission mechanisms started to be practiced to meet the needs of the industries. In addition to continuing with the on-the-job-training practices from the Antiquity period and apprenticeship practices from the Middle Ages and the Renaissance period, the industrial age from the mid-eighteenth century saw vocational and manual training schools, factory schools, vestibule training, gaming situations, case methods, and role-play methods coming into prominence (Estep, 2008; Oakes, 2014; Sleight, 1993). Swanson and Torraco (1994) mentioned that these practices came about to meet the “pounding rate of technological change” (p. 19) witnessed during and after the industrial revolution. Many of these practices continue to this day in various forms.

While different organizations engaged with training in various forms and importance, numerous scholars have argued that two events during World War II (WWII) helped training to be considered as a profession in its own right and an integral part of organizations with sustained interests from both academics and practitioners.

The first was the establishment of the Training within Industry (TWI) project in 1940, a “watershed event in American industry” (Ruona, 2001, p. 120) and “one of the most pivotal turning points in the history of training” (p. 119). Torraco (2016) mentioned that TWI was a:

nationwide partnership between industry and the U.S. War Manpower Commission to rapidly scale up the production of military hardware and efficiently train millions of new workers and supervisors needed for the enormous transformation to a wartime economy... By the time TWI was shut down in 1945, it had trained 23,000 people as trainers and certified 1,759,650 production supervisors. (p. 440)

The highly successful TWI program not only helped the United States (U.S.) manage production and performance in “16,511 manufacturing plants nationwide” (Torraco, 2016, p. 440) during WWII but also allowed industry leaders to appreciate and realize the importance of training (Ruona, 2001) and also facilitated the emergence of the human resource development field (Ruona, 2001; Swanson, 2001; Torraco, 2016). In Table 1, I provide a summary of some key events proceeding the birth of ASTD in the U.S followed by Estep’s (2008) diagrammatic representation of the evolution of the training field in Figure 1.

**Table 1**

*Historical Training Events Based on Estep (2008) and Steinmetz (1967)*

Period	Focus of Training	Key Events
Antiquity	Apprenticeship	Literacy reached neither the craftsman nor the peasantry warranting direct instruction. Rules and procedures on apprenticeship included in the Code of Hammurabi of 2100 B.C
The Middle Ages	Apprenticeship	Formation of guilds Yeomanry guilds became the forerunners of the modern-day labor union Invention of the printing press
	The classroom	Emergence of factories and mass production. Land Grant Act, 1862 - effort to free workers from the limitations of their immediate craft requirements / a means of higher education for the average man's children, which previously could be enjoyed only by the wealthy.
The Industrial Revolution		
	Vocational or manual training schools	Masonic Grand Lodge of New York, established vocational training facilities in 1809.

Period	Focus of Training	Key Events
Antiquity	Apprenticeship	<p>Literacy reached neither the craftsman nor the peasantry warranting direct instruction.</p> <p>Rules and procedures on apprenticeship included in the Code of Hammurabi of 2100 B.C</p> <p>In 1828 the Ohio Mechanics Institute was started in Cincinnati, Ohio.</p> <p>In 1824, Rensselaer Polytechnic Institute in Troy, New York, became the first technical college.</p> <p>Manual training began in the United States in about 1825. Most of the early manual training institutes that sprang up after 1825.</p> <p>In 1828, the Ohio Mechanics Institute opened in Cincinnati, Ohio.</p> <p>Evening classes of a vocational nature - Cooper Union in New York in 1854</p>
	Factory schools	<p>Manufacturer of printing presses had such a volume of business that it was necessary to establish a factory school to train machinists. The old-style apprentice system was inadequate.</p> <p>One of the first was established at Hoe and Company in New York City in 1872.</p> <p>General Electric Company - 1888/ Baldwin Locomotive Works - 1901/ International Harvester Company - 1907</p>
	Vestibule Training	
	Gaming situations	
	Case method	
	Role-play method	
	Cooperative education	<p>University of Cincinnati, College of Engineering, introduced cooperative education. The student would go to school for a 'time and work in a factory for an equal period of time, returning to school for additional training and then going back to the industry for additional practical experience.</p> <p>Formation of the National Society for the Promotion of Industrial Education -1906</p> <p>National Vocational Guidance Association - 1913</p> <p>National Association of Corporation Schools formed - 1913 (Attempt at uncoupling of industry with academic education scholars)</p>
WWI	Systematic Training	<p>Scientific management (Frederick Winslow Taylor).</p> <p>Assembly lines.</p>



Period	Focus of Training	Key Events
Antiquity	Apprenticeship	<p>Literacy reached neither the craftsman nor the peasantry warranting direct instruction.</p> <p>Rules and procedures on apprenticeship included in the Code of Hammurabi of 2100 B.C</p> <p>Formation of the Vocational Association of the Midwest - 1914.</p> <p>Smith-Hughes Act -1917 provided public moneys to assist vocational training efforts</p> <p>In 1918 the National Society for the Promotion of Industrial Education changed its name to the National Society for Vocational Education.</p> <p>In 1917, the Emergency Fleet Corporation of the United States Shipping Board set up an educational and training section under Charles R. Allen.</p> <p>Adopting the 18th century German philosopher, psychologist, and educator Johann Friedrich Herbart's five-step framework for pedagogy, Charles B. Allen launched the four-step method of job instruction training (Show-tell-do-check method) which helped to solve this World War I am training problem. One key takeaway - Training should be done within industry by supervisors who should be trained how to teach.</p> <p>In 1918, War Department Committee for Educational and Special Training appointed Chan Dooley its director and Walter Dietz its secretary. It was their job to develop material for colleges so that almost 100 trades that were desperately needed in the Army would be developed with Army recruits.</p>
	Correspondence school	<p>The post-war boom discouraged the application of training to industry</p> <p>Eduard C. Lindeman challenges idea of teaching adults with pedagogical methods;</p> <p>Hawthorne studies</p>
1920s		<p>National Association of Corporation Schools changed its name to the National Association of Corporation Training - 1920</p> <p>National Association of Corporation Training merged with Industrial Relations Association of America to become National Personnel Association in 1922.</p> <p>National Personnel Association renamed as American Management Association in 1923</p>

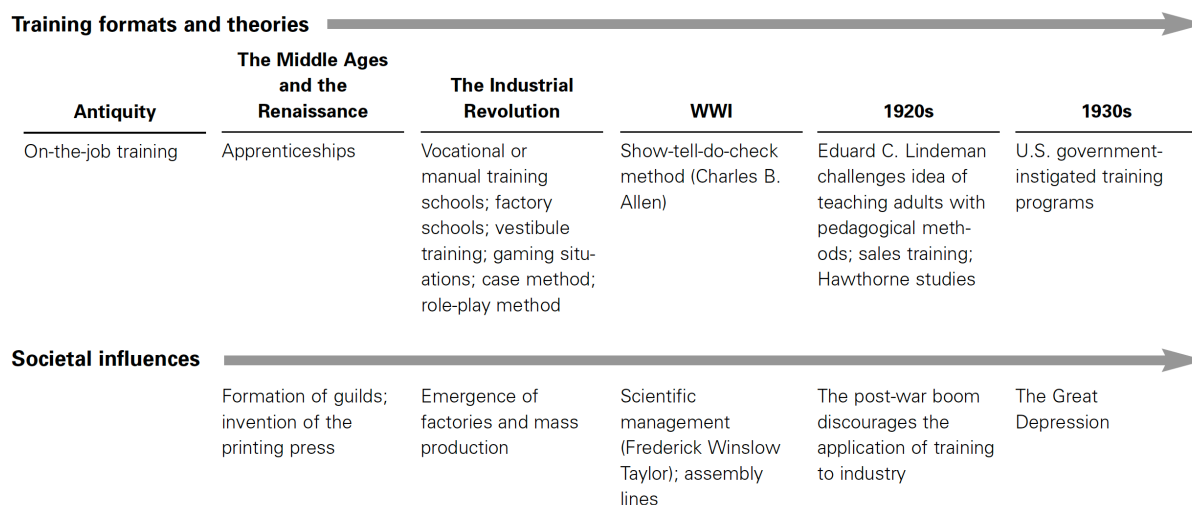
Period	Focus of Training	Key Events
Antiquity	Apprenticeship	<p>Literacy reached neither the craftsman nor the peasantry warranting direct instruction. Rules and procedures on apprenticeship included in the Code of Hammurabi of 2100 B.C</p> <p>In 1925 the Vocational Association of the Midwest and the National Society for Vocational Education merged into the American Vocational Association</p> <p>Practical Foremanship published by G. L. Gardiner in 1925. Described how a foreman should teach his "green" men to do the job, employing the principles of industrial instruction and the studies by Taylor and the Gilbreths on job simplification</p>
1930s	U.S. government instigated training programs	<p>The Great Depression</p> <p>In 1934 the George-Elzey Act was passed; it replaced the George-Reed Act and expanded still further vocational educational privileges</p> <p>George-Deen Act, 1936 authorized, on a continuing basis, an annual appropriation of approximately \$14 million for vocational education in agriculture, home economics, trades and industry, and, for the first time, distributive occupations</p>
	Training in the handicrafts	<p>In 1937 the National Apprenticeship Act authorized the Secretary of Labor to formulate labor standards for the welfare of apprentices and to cooperate with the Office of Education in providing related ' instruction for apprentices.</p>
	Sales training	<p>National Society of Sales Training Executives (NSSTE) established in 1940</p> <p>Supply of vocational school instructors was fairly well exhausted and training function of the supervisor became paramount.</p>
	J Programs	<p>Establishment of the War Production Board and within that organization the Training within Industry group (TWI)</p>
WWII		<p>Job Instructor Training (JIT) - a three-day training program in how to train supervisors to use the JIT formula.</p> <p>JIT's purpose was to teach first- and second- line supervisors how to teach their skills to others. These train-the-trainer programs came to be known as J programs and expanded to include topics such as human relations, job methods, safety, and program development.</p>

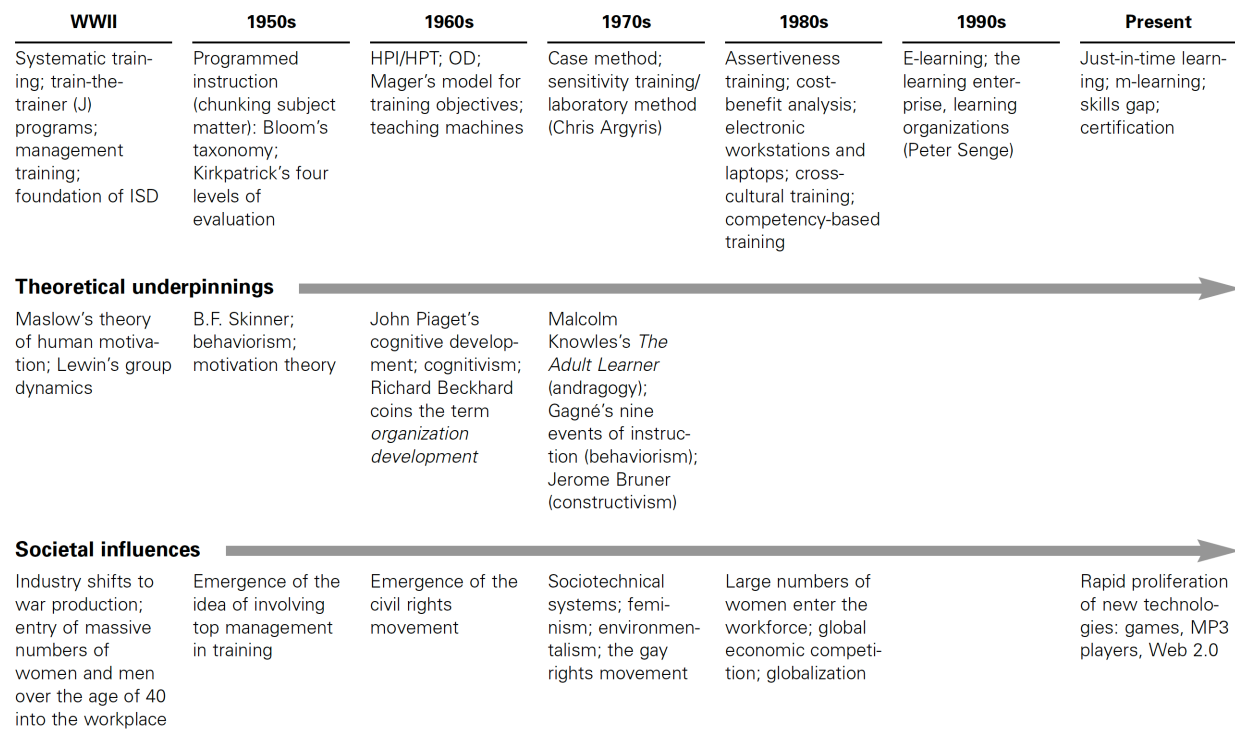
Period	Focus of Training	Key Events
Antiquity	Apprenticeship	<p>Literacy reached neither the craftsman nor the peasantry warranting direct instruction.</p> <p>Rules and procedures on apprenticeship included in the Code of Hammurabi of 2100 B.C</p> <p>Program Development Training course (PDT) was developed for executives unfamiliar with training techniques</p> <p>Military applied a systems approach to learning design.</p> <p>In order to meet the need for upgrading workers in college-level-type subjects, the Engineering, Science, and Management War Training program (ESMWT) was instituted.</p> <p>First National Conference of Educational Directors in Industry -1944</p> <p>Birth of the Training Director to coordinate trainings.</p> <p>Association of Training Directors established in 1943.</p>

In Figure 1, I present Estep's (2008) schematic diagram on the *progress* of various training formats and theories.

**Figure 1**

*Timeline of Training Format and Practices*





The second event was the formation of the American Society of Training Directors on April 2, 1942 (Oakes, 2014). This organization, which subsequently changed its name to the American Society of Training and Development in 1964 and to the Association for Talent Development (ATD) in 2014, not only allowed training to come out as field in its own right but also helped training to expand globally with the sustained publication of a variety of texts (journals, magazines, handbooks, etc.). Key events in ATD's history are presented in Table 2.

**Table 2**

*Historical ASTD events*

Year	Key events
1943	American Society for Training Directors is formed.
1945	Starts quarterly publication of <i>Industrial Training News</i> .
1945	First national conference is held in Chicago, Illinois.
1946	The first full volume of <i>Industrial Training News</i> is published.
1947	<i>Industrial Training News</i> changed to <i>Journal of Industrial Training</i> and becomes bi-monthly.
1951	First permanent office opened in Madison, Wisconsin.

Year	Key events
1954	<i>Journal of Industrial Training</i> changed to <i>Journal of the American Society of Training Directors</i> .
1958	Monthly publication of <i>Journal of the American Society of Training Directors</i> starts.
1963	<i>Journal of the American Society of Training Directors</i> changed to <i>Training Directors Journal</i> .
1964	American Society for Training Directors becomes American Society for Training and Development.
1966	<i>Training Directors Journal</i> becomes <i>Training &amp; Development Journal</i> .
1967	<i>Training and Development Handbook</i> (1st ed.) is published.
1972	<i>A Manual on Forming National Training and Development Organizations</i> is translated into French and Spanish.
1975	Branch office in Washington, D. C. is opened.
1976	<i>Training and Development Handbook</i> (2nd ed.) is published.
1978	<i>Study of Professional Training and Development Roles and Competencies</i> is published.
1978	Following ASTD's efforts in congress, the Employee Education Assistance IRS exemption is approved.
1970s	Increased collaboration with the U.S. Department of Labor and the State Department on research projects and creation of resources for training efforts in other countries.
1981	Headquarters is moved to Washington, D.C. and is relocated to Alexandria, Virginia in 1985.
1987	<i>Training and Development Handbook</i> (3rd ed.) is published.
1987	ASTD establishes a research function and receives a \$750,000 grant from the U.S. Department of Labor. Research grants to ASTD reached almost \$3 million by 1993.
1990	ASTD and the U.S. Department of Labor published <i>The Learning Enterprise</i> by Anthony P. Carnevale and Leila J. Gainer, as well as the more comprehensive <i>Training in America: The Organization and Strategic Role of Training</i> , by Carnevale, Gainer, and Villet. Both works established the size and scope of training enterprise in U.S.
1991	<i>Training Directors Journal</i> becomes <i>Training &amp; Development</i> .
1991	<i>America and the New Economy</i> by ASTD's chief economist, Anthony Patrick Carnevale established the economic link between learning and performance.
1994	<i>The ASTD Technical and Skills Training Handbook</i> is published.
1995	ASTD's first international conference is held in Anaheim, California
1996	<i>The ASTD Training and Development Handbook: A Guide to Human Resource Development</i> (4th ed.) is published.
2001	<i>Training and Development</i> becomes <i>T+D</i>
2001	ASTD Certification Institute is established.
2006	First CPLP certification awarded.
2008	<i>ASTD Handbook for Workplace Learning Professionals</i> (1st ed.) is published.

Year	Key events
2009	<i>ASTD's Ultimate Train-the-trainer: A Complete Guide to Training Success</i> is published.
2012	<i>ASTD's Handbook of Measuring and Evaluating Training</i> is published.
2012	ASTD introduced Communities of Practice.
2013	<i>2013 ASTD Competency Study</i> is published.
2014	Name changed to Association for Talent Development.
2014	<i>ASTD Handbook: The Definitive Reference for Training &amp; Development (2nd ed.)</i> is published.
2015	<i>4 Volume Train the Trainer</i> is published.
2015	ATD opens its first office outside the United States in Beijing, China
2016	Membership is 36,000, with members working in 120+ countries

In addition to ASTD, three groups have also had a lasting influence on how training has been understood, researched and practiced: adult educators, human resource development (HRD) scholars and practitioners and psychologists working mainly in industrial, work and organizational psychology.

### **Adult Education and Training**

What counts as adult education has long been a contentious issue (Merriam & Bierema, 2014), with Mayo (2009) even claiming that “defining adult education is an impossible task” (p. 269) with adult education coming to be seen as “umbrella term for a large number of diverse educational activities directed at adults” (Watkins & Marsick, 2014a, p. 45). While a detailed discussion of this is beyond the scope of this dissertation, it is necessary to point out that adult education in the U.S. has been professionalized since 1926, when the American Association for Adult Education was established (Rose, 2008). Over the years, this association merged with similar organizations and is currently manifested as the American Association for Adult and Continuing Education, and all these associations have had their own journals, conferences and theorists. Historically adult education has been concerned with

individual and social improvement such as increasing literacy and civil rights ... [helping] ... adults to move up the social, intellectual, and economic ladder, often concerning itself with people at society's margins—immigrants, farmers, union members and factory workers, urban poor and minorities, and eventually women and people of color ... [and thus have focused on] ... community development, citizenship, literacy, and basic education of underserved populations. (Watkins & Marsick, 2014, p. 45)

These historical concerns around “social justice, access and rights to opportunities” (Watkins & Marsick, 2014, p. 44) continue to be the current concerns of various adult educators. Although there has been postmodern and poststructural theorization and criticism of adult education (e.g., Bagnall, 1994; Brookfield, 2000; Kang, 2007; Pietrykowski, 1996; Usher & Bryant, 1997), the field has continued to be driven by humanistic (e.g., Knowles, 1970, 1989; Knowles et al., 2011) and critical social theorization (e.g., Brookfield, 2005; Preskill & Brookfield, 2009; Cervero & Wilson, 2001). In addition to the issues outside of organizations, Merriam and Brockett (2007) mentioned that “the modern era of adult education has [also] been concerned with educating and retraining adults to keep the United States competitive in a global economic market” (p. 9).

### **Psychology and Training**

As discussed briefly earlier, training in various forms has been occurring from time immemorial. But it is with the work of early twentieth century industrial-organizational (I-O) psychology scholars like Münsterberg (1913), Myers (1925), and Viteles (1932) against the background of technological advancement Western factories and Frederick Taylor's theorization of workplace efficiency and scientific management (Taylor, 1911) that a sustained scholarship on training started to be observed. Kraiger and Ford (2007) mentioned that

since that time, I-O psychologists have played various roles relevant to improving the quality and effectiveness of training, including research on learning and transfer, development of methods of training measurement, enhancement of methods for training design and delivery, and positioning of the training function within organizations. (p. 281)

From the earliest work of Münsterberg (1913), psychologists from sub-fields like industrial-organizational psychology and industrial, work and organizational psychology (IWOP) have consistently produced a large volume of empirical and theoretical work on training as witnessed in the annals of journals like *Personnel Psychology*, *Annual Review of Psychology*, *Industrial and Organizational Psychology*, *Journal of Applied Psychology*, etc. The psychologists were also the first in publishing textbooks on Training (e.g., Goldstein, 1974). The knowledge produced in these journals and textbooks including “systematic processes for conducting pretraining needs analysis and posttraining evaluation of training as well as advanced new methods for training design and delivery” (Kraiger & Ford, 2007, p. 281) have been taken up by not only other psychologists but also by scholars in fields like HRD and training around the world.

### **HRD and Training**

Chalofsky (2014) mentioned that a graduate program that started in 1958 at George Washington University “designed for federal government trainers and [which] was a master’s program in employee development” (p. xxxviii) was renamed as HRD by Len Nadler in 1970 immediately after publication of his seminal textbook *Developing Human Resources*. While many claim Nadler conceptualized HRD (e.g., Ruona, 2002), Chalofsky stated that although



“there is a question as to whether he actually originated the term, ... he definitely introduced it to the U.S.-based training and development field” (p. xxxviii).

While there has been a long history “of scholarly wrangling about the nature of the field [of HRD]” (Ruona, 2016, p. 551), many HRD scholars believe training to be a core component of HRD, whatever their other disagreements may be. Starting from Leonard Nadler’s conceptualization of the HRD model in 1970, where training along with education and development was one of the three components of the model (Nadler & Nadler, 1991), many latter scholars like Dilworth (2003), Marsick and Watkins (1994), Marquardt and Engel (1993), McLagan (1989), McClean and McClean (2001), Swanson (1995) and Watkins (1989) in their articulation of what HRD is and what constitutes HRD stress the importance of training in HRD. These definitional articulations of HRD and training continue to be supported by the publication of articles focusing on training in the four major HRD journals sponsored by the Academy of HRD<sup>10</sup>. For example, in a 2011 study, Jeung et al. (2011), conducting a content analysis of the twenty most frequently cited articles in the four AHRD journals, found that “the most dominant topic of the top twenty HRD articles was training transfer and evaluation” (p. 101). Similarly,

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<sup>10</sup> The Academy of Human Resource Development (AHRD) was founded on May 7, 1993, to encourage the systematic study of Human Resource Development (HRD) theories, processes, and practices; to disseminate information about HRD; to encourage the application of HRD research findings; and to provide opportunities for social interaction among individuals with scholarly and professional interests in HRD from multiple disciplines and from across the globe. This remains the mission today. The organization’s vision is “Leading Human Resource Development through Research.” The Professor’s Network of the American Society of Training and Development (ASTD) and the University Council for Research on HRD provided the catalyst for the development of AHRD. The combined goal of wanting to advance the profession through research and scholarship realigned the two groups into the newly formed and independent Academy of Human Resource Development. Currently, AHRD publishes four journals (Advances in Developing Human Resources, Human Resource Development International, Human Resource Development Quarterly, and Human Resource Development Review). ([www.ahrd.org](http://www.ahrd.org))

Ghosh et al. (2014) conducted a frequency and content analysis of articles appearing in AHRD journals from 2002 to 2011 and found that training was the second dominant theme after learning in the journal articles, although they also noted the decreasing trend for these two themes.

Further, McGuire and Cseh (2006) conducted a study using Delphi methodology to explore the views of HRD academics (past and present members of both the editorial boards of the four main AHRD journals and the Board of Directors of the AHRD). They found the interviewed academics thought “that workplace learning, employee development and training and development represent[ed] important functions of HRD” (p. 661). It is thus not surprising that Swanson and Holton (2009) in their influential book *Foundations of Human Resource Development* mentioned that “training and development constitutes the largest realm of HRD activity” (p. 226).

### **An Overview of T&D Scholarship**

T&D, a key component of HRD<sup>11</sup>, has been widely accepted as something that organizations should vigorously engage with by practitioners and scholars around the world in a wide variety of literature. The T&D field currently has a large number of refereed academic journals both in and outside the United States<sup>12</sup>, a large number of practitioner journals<sup>13</sup> with

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<sup>11</sup> While HRD scholars have historically been from the U.S. (McClean & McClean, 2001), HRD has expanded globally in various forms (Han et al., 2017; McLean & Akaraborworn, 2015; McClean & McClean, 2001). Very similar understandings of HRD as those found in the U.S. are found around the world, although local sensibilities have been incorporated in the understanding and interpretation of HRD (McLean & Akaraborworn, 2015; McClean & McClean, 2001).

<sup>12</sup> Some refereed academic journals are *European Journal of Training and Development*, *International Journal of Training and Development* and *International Journal of Training Research*.

<sup>13</sup> Some practitioner journals/magazines in the U.S. are *T+D*, *Training Journal* and *Training Magazine*.

wide coverage, hundreds of textbooks, numerous handbooks and competency models and thousands of dedicated websites on different aspects of T&D. A large part of what we know about T&D in academic terms (for e.g., models, relationships between various components, etc.) comes from the work of scholars working in various psychology fields and psychology has had a great influence on how T&D has evolved and also how training and development can be thought of, theorized and practiced in the wider arena. The 2012 study of Salas et al. claimed to be a "state-of-the-art review of science of training" (Kraiger, 2014, p. 403) confidently concluded that "training works" (Salas et al., 2012, p. 74). The authors claimed that since meta-analysis after meta-analysis have shown the effectiveness of training, it was not necessary to research the question of whether or not training works. The authors reasoned that research efforts thus should be directed at "spreading the good word [of training], helping organizations to understand the benefits of well-designed and competently delivered training and development" (Kraiger, 2014, p. 403).

A review of other seminal papers in the T&D field (although many of these papers are in psychology related journals, they are widely referenced by HRD scholars interested in T&D issues) reveals that scholars are upbeat regarding the future of training; are very clear on what training's function is; and are confident in the ability of training to help organizations. Bell and Ford (2007) noted that training was the most pervasive and potentially potent method of enhancing individual productivity and organizational effectiveness. Swanson and Torrance (1994) mentioned that "the foremost role of training in organizations is the development of workplace expertise" (p. 18) and that "training helps them to remain competitive by continually educating their workforce" (Salas et al., 2012, p. 74). There is wide acceptance of the claim that T&D is indeed empowering for those being trained, and organizations would be seriously disadvantaged

in the absence of T&D activities (Salas et al., 2012). Additionally, scholars confidently declare that “there is a science of training that shows that there is a right way and a wrong way to design, deliver, and implement a training program” (Salas et al., 2012, p. 74).

In the practitioner literature, from 1978, ASTD has been publishing competency studies targeting T&D professionals. Key findings as listed by ASTD (2013) from some of the competency studies are tabulated in Table 3.

**Table 3**

*Key Findings from Various Competency Studies*

Study	Description	Key Findings
1978: A Study of Professional Training and Development Roles and Competencies	A Study of Professional Training and Development Roles and Competencies defined the basic skills, knowledge, and other attributes required for effective performance of training and development activities. The Study questioned more than 14,000 ASTD members in the United States, Canada, and Mexico, and 500 members outside North America.	<p>The 1978 Study, conducted by Patrick Pinto and James Walker, revealed the following major areas for T&amp;D practitioners:</p> <ul style="list-style-type: none"> <li>• analyzing and diagnosing needs</li> <li>• determining appropriate training approaches</li> <li>• designing and developing programs</li> <li>• developing material resources</li> <li>• managing internal resources</li> <li>• managing external resources</li> <li>• developing and counseling individuals</li> <li>• preparing job- or performance-related training</li> <li>• conducting classroom training</li> <li>• developing group and organization development</li> <li>• conducting research on training</li> <li>• managing working relationships with managers and clients</li> </ul>

Study	Description	Key Findings
1983: Models for Excellence	Models for Excellence defined training and development and established the format for all the ASTD Competency Model studies published since 1983.	<ul style="list-style-type: none"> <li>• managing the training and development function</li> <li>• managing professional self-development.</li> </ul> <p>Models for Excellence was launched in 1981 when Patricia McLagan carried out a series of studies focused on training and development and the trainer's role. The 1983 report (McLagan &amp; McCullough, 1983) included:</p> <ul style="list-style-type: none"> <li>• a depiction of HRD as a wheel</li> <li>• a definition of training and development</li> <li>• a list of 34 forces expected to affect the T&amp;D field</li> <li>• 15 T&amp;D roles</li> <li>• 102 critical outputs for the T&amp;D field</li> <li>• 31 T&amp;D competencies</li> <li>• four role clusters</li> <li>• a matrix of 15 roles/31 competencies.</li> </ul>
1989: Models for HRD Practice	Models for HRD Practice defined the profession to include career development and organization development as well as training and development. It defined HRD as "the integrated use of training and development, organization development, and career development to improve individual, group, and organizational effectiveness."	<p>The 1989 Study depicted HRD within the larger human resource field as a wheel encompassing activities including training and development, organization development, career development, organization/job design, human resource planning, performance management systems, selection and staffing, compensation and benefits, employee assistance, union/labor relations, human resource research, and information systems.</p> <p>In addition, the Study:</p> <ul style="list-style-type: none"> <li>• described 74 outputs of HRD work and identified</li> </ul>

Study	Description	Key Findings
1999: ASTD Models for Workplace Learning and Performance	Practitioners, senior practitioners, and line managers provided input for the ASTD Models for Workplace Learning and Performance to determine what current and future competencies (five years beyond 1999) would be required to succeed in the field. The 1999 report defined workplace learning and performance as “the integrated use of learning and other interventions for the purpose of improving individual and organizational performance.”	<p>quality requirements for each output</p> <ul style="list-style-type: none"> <li>• pinpointed 35 competencies for HRD and identified key ethical issues affecting HRD</li> <li>• summarized 11 HRD roles, including, researcher, marketer, organization change agent, needs analyst, program designer, HRD materials developer, instructor/facilitator, individual career development advisor, administrator, evaluator, and HRD manager.</li> </ul> <p>This report defined roles (not job titles) as “a grouping of competencies targeted to meet specific expectations of a job or function.” (Rothwell, et al., 1999, xv). Seven workplace learning and performance roles were identified, including manager, analyst, intervention selector, intervention designer, intervention implementor, change leader, and evaluator. A set of 52 specific competencies were identified, classified into six groups:</p> <ol style="list-style-type: none"> <li>1. Analytical Competencies—the creation of new understandings or methods through the synthesis of multiple ideas, processes, and data</li> <li>2. Technical Competencies—the understanding and application of existing knowledge or processes</li> <li>3. Leadership Competencies—influencing,</li> </ol>

Study	Description	Key Findings
2004: ASTD Competency Study: Mapping the Future	More than 2,000 training and development professionals and senior leaders from around the world participated in the ASTD Competency Study: Mapping the Future. The principal objectives were to: 1) identify the most significant trends and drivers that would impact current and future practice; 2) describe a comprehensive, inspiring, and future-oriented competency model; and 3) provide a foundation for competency-based applications, deliverables, and outputs—including certification.	<p>enabling, or inspiring others to act</p> <p>4. Business Competencies—understanding organizations as systems and the processes, decision criteria, and issues that businesses face</p> <p>5. Interpersonal Competencies—understanding and applying methods that produce effective interactions between people and groups</p> <p>6. Technological Competencies—understanding and applying current, new, or emerging technologies</p>
		<p>The Study identified eight key trends for which training and development professionals should prepare, including:</p> <ol style="list-style-type: none"> <li>1. Drastic times, drastic measures</li> <li>2. Blurred lines—life or work</li> <li>3. Small world and shrinking</li> <li>4. New faces, new expectations</li> <li>5. Work be nimble, work be quick</li> <li>6. Security alert!</li> <li>7. Life and work in the e-lane</li> <li>8. A higher ethical bar</li> </ol> <p>The Study identified three major categories (clusters) of Foundational Competencies and four key roles associated with each category—</p> <p>intrapersonal, business/management, and personal—and nine major Areas of Expertise (AOEs) needed by training and development professionals:</p>

Study	Description	Key Findings
		<ol style="list-style-type: none"> <li>1. Designing Training</li> <li>2. Improving Human Performance</li> <li>3. Delivering Training</li> <li>4. Measuring and Evaluating</li> <li>5. Facilitating Organizational Change</li> <li>6. Managing the Learning Function</li> <li>7. Coaching</li> <li>8. Managing Organizational Knowledge</li> <li>9. Career Planning and Talent Management</li> </ol>

For more than three decades, the ASTD model has been developed and used as a framework for training, developing and hiring employees in the USA (Rothwell, 1996) as can be seen in the following schematic figure of ASTD's 2013 competency model.

**Figure 2**

*ASTD's 2013 Competency Model*



While the competency standards are not cited and referenced frequently in academic journals, the standards have been accepted and are successfully used in a diverse range of



organizations (Arneson, et al., 2013). ASTD in their 2013 study provide examples of how organizations like the University System of Georgia (USG) have used “the Competency Model to identify the competencies needed to perform training and development work and then uses ASTD products to help increase its HR and OD employees’ collective skill set” (Arneson, et al., 2013, p. 37). In Figure 3, I provide how ASTD presented USG usage of ASTD’s competency model.

### Figure 3

#### *USG’s Usage of ASTD’s Competency Model*

The University System of Georgia’s Board of Regents recognized the need for developing HR leadership at the system level in 2009 after a close examination of its 35 academic institutions.

At the time, each of these institutions had its own HR department and each institution’s level of training and development capacity varied. Some programs were well established, while others had limited personnel and resources dedicated to training and development.

Faced with this challenge, Tina Woodard, Assistant Vice Chancellor for Organizational Development in the Board of Regents’ office, launched the Professional Development Consortium (PDC; for more information on the PDC, see [http://www.usg.edu/hr/development/professional\\_development\\_consortium](http://www.usg.edu/hr/development/professional_development_consortium)). Consisting of HR and OD staff from six key institutions within the University System of Georgia, the PDC leveraged the existing training and development capacity of these key institutions to create Regional Training Centers responsible for (a) conducting training needs assessments for institutions in its region, (b) developing training programs, and (c) sharing resources.

The mission of the PDC is to facilitate collaboration and organizational learning with a central goal of increasing the training and development capacity between HR and OD professionals at each institution.

The ASTD Competency Model and other ASTD products played a key role in accomplishing these objectives. The system used the ASTD Competency Model as the basis for conducting system wide, regional, and institutional needs assessments. For example, through surveys and qualitative discussions, the Competency Model was used to identify gaps in training and development knowledge and skills among the HR and OD staff.

PDC staff created a core set of system wide training courses for professionals in the university system using the results of these needs assessments. The PDC also conducted train-the-trainer sessions with institutions that had fewer than average established training and development personnel to ensure these programs were administered effectively. Individual institutions and the university system also purchased a number of ASTD publications such as Infoline, the ASTD Learning System, ASTD Press books, and T+D to help build training and development capacity.

To further deepen training and development capacity, the university system assembled a virtual study group to prepare HR and OD professionals within the system to obtain a Certified Professional in Learning and Performance (CPLP) designation. However, the goal of this effort is not solely to obtain credentials, but also to build training and development skills among employees and increase community among individuals doing training and development work. Study group participants and facilitators are also using ASTD's preparation resources (for example, the CPLP Study Group Leader's Guide) to meet these objectives.

In short, the University System of Georgia uses the Competency Model to identify the competencies needed to perform training and development work and then uses ASTD products to help increase its HR and OD employees' collective skill set.

To further understand what is currently commonly accepted in the dominant T&D scholarship, in the next section, I will discuss the various research paradigms followed by a brief discussion on the research being carried out in T&D in terms of these paradigms along a discussion of some criticism of the T&D field.

### **Paradigms**

"Paradigms are models or frameworks that are derived from a worldview or belief system about the nature of knowledge and existence ... [which] ... are shared by a scientific community and guide how a community of researchers acts with regard to inquiry" (Aghasaleh, 2016, p. 65). Based on the work of Jürgen Habermas, Lather and St. Pierre (2013) stated that in the social sciences there are various paradigms that are concerned with predicting, understanding, emancipating, and deconstructing, also known as positivist or positivism, interpretive or interpretivism, critical and poststructural or poststructuralism respectively.

### **Positivism**

Positivism is a philosophy that stipulates that it is only through experience that one can obtain genuine or legitimate knowledge. Positivism "was an approach that strongly emphasized induction, which can be defined as presuppositionless inquiry by which theory is arrived at from the observation of facts" (Delanty & Strydom, 2003, p. 15). This way of reasoning can be traced

to Auguste Comte's positive philosophy of "strict empiricism ... [which would allow] ... distinguishing ... dependable empirical knowledge from claims made by theology and metaphysics" (Schwandt, 2015, p. 240). Comte thus set the stage for subsequent philosophers to postulate that "there is an existing order in the social—underlying laws and regularities—just as there is in the natural order and that order must be examined as it is, not as it is imagined" (St. Pierre, 2012, pp. 487-488) requiring it "to be studied objectively from the outside" (Delanty & Strydom, 2003, p. 18). Based on this premise, a common thread emerges in many of the positivists' arguments (e.g., Durkheim, 1895/2003; Hempel, 1952/2003; Nagel, 1961/2003)—that social science is not different from the natural sciences and that social science did not have the much-needed general laws (Hempel, 1952/2003; Nagel, 1961/2003) of natural science. Thus, according to philosophers in this tradition, the methodological approaches of natural science are equally applicable to research in social science (Durkheim, 1895/2003; Hempel, 1952/2003; Nagel, 1961/2003), and "scientific knowledge, [is] the sole form of certain knowledge, not only as the paradigm of all valid knowledge but even as the solution to collective problems facing humankind" (Delanty & Strydom, 2003, p. 15). Various theorists articulated that "the social sciences should have as their goals both prediction and causal, nomological explanation of human behavior" (Schwandt, 2015, p. 213). Delanty and Strydom (2003) captured this essence and mentioned that "at least six complexes of ideas can be extrapolated as being the basic suppositions or tenets of positivism .... unified science ... empiricism ... objectivism ... value freedom ... instrumentalism ... [and] ... technicism" (p. 13). Standing on these early assumptions, a group known as the Vienna Circle, from 1922 onward, initiated reformulations of some of the tenets of positivism, which led to a revised form of thinking labeled neopositivism,

which itself consisted of a variety of distinct sets of thinking like logical positivism and logical empiricism.

### **Logical Positivism**

Borrowing concepts from analytical philosophers like Wittgenstein, Russell, and Whitehead, "the logical positivists developed the idea of constructing a logically correct language which would readily distinguish between meaningful and meaningless scientific propositions" (Schwandt, 2015, p. 190). Delanty and Strydom (2003) mentioned that in engaging in this new form of argumentation, the philosophers moved from the "older positivist thing-event-fact model...[to]...thing-event-fact-language model" (pp. 15-16). Philosophers now argued that "positively given or the empirical was no longer total" (p. 15) and introduced "the logical". According to this view, to be legitimate, a scientific inquiry needed to rely on logical analysis and empirical research. Schwandt (2015) mentioned that while not all the philosophers labeled as logical positivists agreed with each other, certain doctrines emerged from their work:

to be considered genuine, legitimate, and meaningful, a knowledge claim about the world must be capable of verification...only...analytical statements of mathematics and logic which are knowable and a priori, and synthetic or contingent statements which are knowable a posteriori based on verification through observation...are of value in scientific knowledge...[and] all justified belief ultimately rests on noninferential self-evident observations. (p. 191)

In contrast to the earlier inductive positivistic assumption that "theory is arrived at from the observation of facts" (Delanty & Strydom, 2003, p. 15), some of the latter neo-positivistic thinkers took an anti-inductive stance in the form of "deductive logic (the application of theory to the concrete case)" (p. 15). Popper (1934/2003) challenged and attacked "...inductive empiricism

with his claim that science does not proceed by means of presuppositionless inquiry but constitutes its object with the aid of epistemological frameworks, theories, concepts and methods" (Delanty & Strydom, 2003, p. 372). This attack facilitated the shift toward seeing science as a hypothetico-deductive process in which "scientists were to formulate theories or hypotheses to be tested by experimentation and observation" (Pernecky, 2016, p. 53). This was in contrast to the "old positivist view according to which science consists of the observation and accumulation of facts, devoid of any theory whatsoever, and the subsequent allowing of facts to speak for themselves" (Delanty & Strydom, 2003, p. 21). While still arguing for the need for observation, Popper (1934/2003) moved away from arguing that the aim of science was to verify or confirm theories to argue that the aim should be to falsify, reject, or tentatively accept theories.

### ***Empirical Scholarship Guided by Logical Positivism***

Many of the assumptions of different forms of logical positivism are still "very influential" (Delanty & Strydom, 2003, p. 18) in T&D, and it is a "field dominated by quantitative studies" (Lancaster & Di Milia, 2014, p. 654). Popper's hypothetico-deductive process, which starts with a theory, proceeds to formation of a hypothesis that is tested through observation and experimentation, and which is finally confirmed or refuted, has heavily influenced research in T&D. Scholars are concerned with questions of causality, verification, and falsification of hypothesis—investigating the various causal relationships like the link between training pedagogies, training environment, and training effectiveness or factors impacting the transfer of learning. Scholars, by studying various theories in existence, identify dependent and independent variables and develop various hypotheses, followed by choosing appropriate

research design / methodology / method, and finally carrying appropriate statistical analysis.

Some studies situated in positivism listed in next few pages.

**Table 4***Examples of Empirical Scholarship in T&D Guided by Logical Positivism*

Author (Year)	Title	Sample research question / Problem statement	Hypothesis	Methodology/Metho	Sample
Ali (2016)	Impact of gender-focused human resource management on performance: The mediating effects of gender diversity.	Tested the mediating effects of gender diversity (at non-management and management levels) in the relationship between gender-focused policies and practices and performance.	Gender-focused policies and practices are positively associated with non-management gender diversity. Four other hypotheses.	Hierarchical multiple regression / Survey.	HR directors/HR managers/Managing Directors/CEOs) at 1855 organizations. Response rate of 12%
Bulut & Culha (2010)	The effects of organizational training on organizational commitment.	Investigated the impact of organizational training on employee commitment focusing on employees' emotional and affective responses towards their organization	Employees' perception of motivation to training positively affects their organizational commitment. Three other hypotheses.	Multiple regression analyses / Survey.	298 participants of four- and five-star hotels operating in Izmir, Turkey.
Burke & Hutchins (2008)	A study of best practices in training transfer and proposed model of transfer.	How, if at all, are reported best practices affected by the trainer's job level, educational background, and professional certification?	Transfer interventions at least to some extent are setting-specific (certain practices may be best used in certain organizational structures, work designs, and job types).	Quantitative content analysis / Text-based survey responses.	413 surveys distributed to valid e-mail addresses with 33.7% final response rate.
Curado et al. (2013)	Voluntary or mandatory enrollment in training and the motivation to transfer training.	Tested the effect of three motivational factors (job satisfaction, job involvement and organizational commitment) on motivation to transfer in its double	AMT of participants who undergo training by voluntary enrollment is superior to that of those who undergo training as a result	Levene's and Student's t-tests / Questionnaires.	70 Large insurance company employees. Response rate of 74.6 per cent.

Author (Year)	Title	Sample research question / Problem statement	Hypothesis	Methodology/M ethod	Sample
		dimensionality (autonomous and controlled).	of imposed enrollment. One other hypothesis		
Grohman et al. (2014)	Exploring the critical role of motivation to transfer in the training transfer process.	Explored whether motivation to transfer mediated the relationship between training characteristics (transfer design and perceived content validity).	The relationship between transfer design and different measures of training transfer is mediated by motivation to transfer. One other hypothesis.	Quantile regression / Online survey.	252 employees of one industrial company.
Saks & Burke (2012)	An investigation into the relationship between training evaluation and the transfer of training.	(1) is the frequency of training evaluation efforts in organizations related to transfer rates; and (2) which of the four levels of training evaluation is most strongly related to transfer?	The frequency of training evaluation at all four levels will be positively related to the transfer of training. Two other hypotheses.	Multiple regression analysis	150 members of a training and development association in Canada
Suleiman et al. (2018)	Mediation of transfer motivation on the relationship between trainee characteristic and transfer of training: Evidence from educational sector in Nigeria.	Does transfer motivation mediate the relationship between organizational commitment and transfer of training?	Transfer motivation positively mediates the effect of trainee characteristics (organizational commitment) on the transfer of training. One other hypothesis.	Bootstrap and Sobel tests.	605 teachers from Nigeria
Truitt (2011)	The effect of T&D on employee attitude as it relates to training and work proficiency.	Explores the relationships between training experiences and attitudes and attitudes about perceived job proficiency.	Employees with training experiences have positive attitudes about training One other hypothesis.	Gamma test	237 exempt/salaried employees and 111 (47.2%) nonexempt/ hourly employees



Author (Year)	Title	Sample research question / Problem statement	Hypothesis	Methodology/M ethod	Sample
Towler et al. (2014)	Signaling the importance of training.	Examine how perceived leader behaviors are related to trainee perceptions of leader training priorities and to trainee priority for training, and whether trainee motivation to transfer of training moderated the relationship between trainee perceptions and trainee priority for training.	Leader behaviors supporting training will be positively related to trainee priority to train. This relationship will be mediated by leader priority for training.  One other hypothesis.	Confirmatory factor analysis	815 military personnel

## Interpretivism

In the mid to late twentieth century, an interpretative turn was witnessed in the social sciences. Scholars like Clifford Geertz (1973) from the field of Anthropology started arguing for thick descriptions when interpreting cultures. The interpretive turn also saw the work of scholars like Aaron Cicourel, Harold Garfinkel and Erving Goffman, which led to the “rise of ethnomethodology and a sociology of knowledge” (Delanty & Strydom, 2003, p. 87). Their work resulted in the “emergence of a distinctive cognitive and reflexive approach...that developed in the wake of the earlier phenomenological and hermeneutic philosophies... (and these authors) ...advocated in different ways the need for social science to address common-sense forms of knowledge” (Delanty & Strydom, 2003, p. 85). Garfinkel developed ethnomethodology, drawing on parts from Alfred Schutz’s phenomenological sociology and Aaron Cicourel’s cognitive sociology. This approach is “interested in how people accomplish the interactions [which] are taken for granted in everyday life” (Schwandt, 2015, p. 100) and studies the “social action as the product and achievement of knowledgeable and reflective social actors” (p. 100). Thus, reflexivity on the part of *actors* gains importance in this approach, and scientific inquiries “must be capable of eliciting such forms of reflexivity” (Delanty & Strydom, 2003, p. 97). Garfinkel (1960/2003) was concerned that “in most of the available theories of social action and social structure rational actions are assigned residual status” (p. 194) and wished to “to remedy this residual status by re-introducing as a problem for empirical inquiry (a) the various rational properties of conduct, as well as (b) the conditions of a social system under which various rational behaviors occur” (p. 194).

This interpretive turn “valued knowledge produced by Others who were not conventional scientists and through means other than the scientific method” (St. Pierre, 2012, p. 494).

Philosophers taking this turn began accepting:

the belief that all knowledge claims are interpretations, and that there is nothing to appeal to in judging an interpretation but other interpretations. In other words, empirical data (the data of observation and experience) cannot provide any special basis or foundation for knowledge claims that is somehow free of interpretation. (Schwandt, 2015, p. 86)

Thus “in this view, the social scientist is always and only engaged with multiple interpretations that cannot be legitimated by some standard verification procedure” (St. Pierre, 2012, p. 494).

This turn, over the years, has had its fair share of controversies and movements in thought. St. Pierre (2012) stated that “interpretive ... social science specifically reject[ed] the major tenets of positivism ... the goal of a technically managed society efficiently governed by the systematic rationalization, mathematizing, scientizing and commodification of all aspects of life” (p. 494). This stance then led to the resumption of the epistemological-methodological controversy between representatives of the interpretation or understanding school of thought on one side and those who favored explanation on the other side (Delanty & Strydom, 2003). This controversy marked just one of the issues that interpretivists of different varieties would encounter subsequently.

These various interpretive approaches differed from the previous positivist traditions and were sharp departures in many topics and impacted how research was carried out under interpretive traditions. One of the key differences relates to the perspective a researcher will take in the research. In contrast to believing that “knowledge of the social world consists in causal explanations of human behavior” (Schwandt, 2015, p. 158), an interpretive researcher

acknowledges “that knowledge of the social world must start from the insider or social actor's account of what social life means” (Schwandt, 2015, p. 158). This means that it is no longer possible to be a detached spectator in research and maintain an objective stance. It is increasingly clear how concepts like generalization would not be possible if one were to take up the interpretive tradition in contrast with the earlier positivist methodologies. However, this is not to say that some form of transferability cannot occur but that it will be distinctly different from generalizations as understood in the positivist traditions. Thus, interpretive researchers in social science typically have not engaged in survey research to *find reasons* for the success of an educational intervention to establish any form of causal relationships between the success or failure of schooling. Rather, they have engaged with a relatively small number of individuals and employed methods like interviews, focus group discussions, and participant observations to make sense of what was happening. The researchers were cautious in drawing upon the findings of their research and then predicting what would or would not occur in every other training program. The focus was on understanding particular situations / phenomenon and using descriptive language to present the researcher's understanding of what was told or what was observed being cognizant that in the process of preparing the written report relating to the study, the researcher was in fact inscribing and not describing since neutral observations and unbiased presentations can never be made.

### ***Empirical Scholarship Guided by Interpretivism***

Interpretive researchers in T&D (examples tabulated below) typically have not engaged in survey research to *find reasons* for the success of a training program or to establish any form of causal relationships between the success or failure of training. Rather, they have engaged with a relatively small number of individuals and employed methods like interviews, focus group

discussions, and participant observations to make sense of what was happening. The researchers were cautious in drawing upon the findings of their research and then predicting what would or would not occur in every other training program. The focus was on understanding particular situations / phenomenon and using descriptive language to present the researcher's understanding of what was told or what was observed being cognizant that in the process of preparing the written report relating to the study, the researcher was in fact inscribing and not describing since neutral observations and unbiased presentations can never be made.

**Table 5***Examples of Empirical Scholarship in T&D Guided by Interpretivism*

Author (Year)	Title	Sample research question	Methodology	Keywords
Bierema (1996)	How executive women learn corporate culture.	How do executive women learn so that they can break through the glass ceiling?	Anthropological methodology / in-depth semi-structured interviewing and observation / Purposeful sampling of 10 participants.	Thick, rich description.
Dirani (2017)	Understanding the process of transfer of training in a military context: Marching into new roles.	What challenges do veterans experience through the process of transfer of training from military to civilian workplaces?	Descriptive qualitative approach using semistructured interviews / purposeful sampling / 10 participants.	Culture, better understanding of the process, understanding how people interpret their experiences, researcher as instrument.
Evans (2012)	‘Benign Neglect’ – Towards an understanding of the cultural enablers and barriers to learning transfer.	In what ways does organisational culture affect the transfer of learning in the UK civil service?	Social constructionism inspired inductive approach, based on Glaser and Strauss’ concept of grounded theory (1967) / semi-structured Interviews / theoretical sampling / 40 interviewees.	Positivism, social constructionism, culture, gaining trust, Ethical considerations, understanding experiences.
Moerer-Urdahl & Creswell (2004)	Using transcendental phenomenology to explore the “Ripple Effect” in a leadership mentoring program.	What were their experiences with the ripple effect? And in what context or situations did they experience it?	Transcendental phenomenology based on principles identified by Husserl (1931) and translated into a qualitative method by Moustakas (1994) / telephone interviews / purposeful sampling.	Lived experiences / participants voices / essence / difficulty to set aside all bias and assumption / epoche, horizontalization, imaginative variation, intuitive integration, and textural and structural descriptions.

Author (Year)	Title	Sample research question	Methodology	Keywords
Owen (2009)	Instructor beliefs and their mediation of instructor strategies.	How aspects of organizational culture enable or constrain the facilitation of learning in the workplace.	Phenomenological qualitative design / 100 semi-structured / interviews over 5 years / purposeful sampling.	Trustworthiness / credibility / prolonged engagement / building trust with participants / thick and rich descriptions.

As noted earlier, a large proportion of practitioners and scholars around the world have accepted that T&D is something that organizations should vigorously engage with. This view is supported by the significant volume of literature that shows T&D as conceptualized, practiced, and researched in the U.S. has been followed by researchers in non-western contexts (e.g., Chukwu, 2016-Nigeria; Ghosh et al., 2012-India; Novillo, 2015-Ecuador; Rahman et al., 2013-Malaysia; Subedi, 2003, 2011-Nepal). Not surprisingly, some scholars have argued for culturally and contextually relevant T&D practices (Ball & Pence, 2000), and the call has been answered with research that has examined various cultural aspects in T&D (e.g., Attipoe, 2016; Dirani, 2006; Subedi, 2006). It should be noted that the call for culturally relevant research and practices in T&D is reflective of the conversations in the wider field of adult education, where scholars have consistently argued for consideration of culture, context and non-western perspectives of knowing (Forté, 2012; Guy, 1999; Merriam & Kim, 2008). While there are persistent arguments for culturally relevant training practices, the basic assumptions of the T&D field as conceptualized in Western academia are generally not contested, and many of the fundamental assumptions of the T&D field are accepted as true.

Although compared to research influenced by positivism, there are far fewer numbers of research studies guided by interpretivist traditions, many different types of issues can be queried, and T&D would be enriched by these studies. As discussed earlier in this section, there are a variety of interpretive traditions; thus, the questions an interpretive researcher will ask in a T&D context will differ depending on the particular interpretive tradition the researcher will follow. Although there are many possibilities of engaging in interpretive T&D research, one of major challenges in engaging with interpretive methods in the T&D field is that it is difficult to “escape the entrenched positivism” (St. Pierre, 2014, p. 6) of the T&D field. It is difficult not to be



seduced by positivist concepts like bias, saturation, audit trails, inter-rater reliability and triangulation and the strong psychological base of T&D since positivism has been the “epistemological unconscious” (Steinmetz, 2005, p. 109) of T&D for a long period of time.

### **Critical Theories**

*Why should we be content to understand the world instead of trying to change it?*  
*Karl Marx (1846/1974)*

The term critical has drawn a multitude of responses and when used in terms like critical theories is often confusing. Prasad (2005) mentioned that “when used broadly, critical theory refers to a wide range of diverse but interrelated traditions that are united by an interest in *cultural critique*. The Frankfurt School, variants of neo-Marxism, postmodernism, radical feminism, and cultural studies, are frequently subsumed under this label” (p. 136). Frankfurt School that Prasad referenced above was the name given to members and scholars associated to the Marxist-oriented Institut für Sozialforschung (Institute for Social Research) founded in 1923 in Frankfurt, Germany (Freeman & Vasconcelos, 2010). Since most of the Institute's members were Marxists and Jews, the institute was forced into exile by the Nazis. In 1934, it formally moved to Columbia University. In this institute, a blend of explanatory social research, normative critique, and philosophical reflection divorced from the positivist and materialist inclinations of orthodox Marxism emerged that came to be called a critical theory of society by its members in the mid-1930s. The most influential director was Max Horkheimer (1895-1973), and its first generation included the social theorists T. W. Adorno (1903-1969), Herbert Marcuse (1898-1979), Walter Benjamin (1892-1940), and Erich Fromm (1900-1980), among others. Jürgen Habermas, a student of both Adorno and Horkheimer, is perhaps the most widely known member of the second generation of critical theorists to emerge from the Institute after its return to Germany in 1950 (Schwandt, 2015, p. 124). It is necessary to note that while many theorists

are labeled Frankfurt School theorists, they differ in their theoretical articulations with each other and do not agree with each other on all areas.

Prasad (2005) noted that Frankfurt School theorists were “committed to the core emancipatory project of Marxian philosophy” (p. 136) while “moving away from (Marx’s) preoccupation with the economic base of society and structural arrangements” (p. 138) and theorized about ideology<sup>14</sup> and hegemony<sup>15</sup> among other issues. Critical theorists and academics using critical theories in the tradition of Frankfurt School seek to foster insight, provide critique, and create a transformative redefinition of traditional/conventional practices, cultures, and structures while challenging conventional wisdom and practices that are taken for granted which may be using positivist, instrumentalist, and modernist approaches (Freeman & Vasconcelos,

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<sup>14</sup> Although ideology is a term used by various scholars and means many things, Frankfurt School theorists have mobilized Marxian use of ideology. Ideology obstructs or distorts truth which need to be unmasked (Schwandt, 2015) because ideologies

referred to a set or system of ideas that [have] served to justify and legitimize the rule of a dominant social class. As Marx and Friedrich Engels argued in *The German Ideology*, the task of the revolutionary philosopher is to unmask and expose “the illusion of the epoch”—an illusion shared by rulers and ruled alike but working to the advantage of the rulers at the expense of those they ruled. Once the class or classes at the bottom of society begin to see that the ruling class has no legitimate claim to its dominant position—that is, once the oppressed people see through the ideology that supports their oppressors—then revolution becomes a real possibility. (Bal & Dagger, 2011, p. 760)

<sup>15</sup> Flint (2009) explained hegemony as

the capacity to exercise control by means other than coercive force; namely, through constructing a willing mass acquiescence towards, and participation in, social projects that are beneficial only to an elite. Hegemony is the dissemination of the values and cultural practices of the elite in such a way that they become unquestioned. Thus, in everyday life the beliefs and values of the elite are reinforced, and a hierarchical social order is reinforced by the everyday actions ... of those who benefit less, if at all, from its existence. (p. 327)

Freeman et al. (2012) have noted that the Gramscian notion of hegemony, “suggests that the ruling class gains power over subordinates by controlling ‘civil society’ or institutional structures” (p. 3) with subordinated groups living “their subordination within everyday systems of practice and in so doing strengthen and sustain it” (pp. 3-4).

2010). Critical theorists doubt that interpretations that simply describe lived experience go far enough. Critical social scientists are ethically committed to identify, expose, and overturn structures of oppression that lead to false consciousness and hegemony in which people contribute to their own oppression. Thus, emancipation from social injustice is the goal of the critical social sciences (Freeman & Vasconcelos, 2010). Critical academic literature seeks to trouble the political side of behavior that is presented as neutral or technical. Critical scholars not only theorize but also champion praxis of what is being theorized to uplift the life of disenfranchised and marginalized populations.

### **Criticism of T&D**

Some scholars have argued that contemporary training practices in organizations are also primarily grounded in behaviorism (Gilley et al., 2001; Merriam & Bierema, 2014; Spurgeon & Moore, 1997). Behaviorism is typically characterized in terms of its methodology, which includes the use of behavioral objectives, practice, feedback, and reinforcement (Spurgeon & Moore, 1997) in educational settings. Gilley et al. (2001) mentioned that “the role of the teacher in behaviorism is to foster behavior that promotes the survival and success of both individuals and society” (p. 26) and thus educators engage in pedagogies that ensure the mastery of certain pre-defined skills, knowledge and behavior. Trainers working in organizations identify the exact skills, competencies and knowledge that need to be mastered for efficient execution of the job and plan, design and deliver training in which the trainees learn to master specific skills, competencies and knowledge that can be applied in their workplaces, and which can be measured and observed.

It has been argued that training structured under behaviorism follows a modernist epistemology that is positivist in nature, concerned with objectivity, and relies on instrumental

rationality to legitimize knowledge (Sauvé, 1999). The concept of modernity is rooted in the Enlightenment, which began in eighteenth century Europe. While it peaked at the end of nineteenth century, its effect is still found in all areas of society, and the defining characteristics and institutions of contemporary societies can be traced to the beliefs originating in the Enlightenment (Elliot, 2001). Modernity values reason and proposes the rational and progressive construction and transformation of society and reality heavily hinged on a paradigm of a subject/object dichotomy (Kim,1996), a view that mind and body are essentially separate entities and “that humans can find the ‘right’ solutions to economic, organizational, social and educational problems through scientific research” (Elliot, 2001, p. 33). The basis of modernity rests on division and the relation between subject (one who transforms) and object (one who is transformed), and in the field of education, the subject has been understood as the teacher and the student as the object (Kim et al., 1994). Modernity’s assumption is that there is *a* truth that is out there, independent and transcendent, and a student, with the help of a teacher, can make efforts and succeed at knowing the truth. These assumptions have produced “well-established paradigms of knowledge acquisition and learning [that] have dominated the ways educators train adults to do their work” (Melacarne & Nicolaides, 2019, p. 37). Scholars have stated that since organizations are so entrenched in the ways of modernity, which “promotes an instrumental rationality based on scientific and technological knowledge” (Sauvé, 1999, p. 19), training have “mimic[ed] modernist bureaucratic institutions where standardisation, centralisation, mass production and mass consumption are the norm” (Hargreaves, 1994 as cited in Elliot, 2001, p. 32). Further, it could be argued that the predominant behaviorist views of learning that guide the majority of training conducted by organizations are guided by the understanding that “the different realities are actually unitary, and explainable in the form of competency based

standards, uniform syllabi and relatively shallow beliefs about what learning is, how it should be managed and indeed, measured” (Garrick, 1994, p. 127). Faced with how organizations are continuing to rely on instrumental means of training their workforce in the face of unprecedented pace of political, societal, and technological changes, scholars like Melacarne and Nicolaides (2019) have argued “adult educators and those who help develop professional capabilities can no longer rely solely on instrumental learning to grow the mindsets and skillsets that meet the demands of a complex social context” (p. 37).

Some scholars have critiqued training practices based on Paulo Freire’s banking concept of education (Armitage, 2010): the trainer trains, and the trainees are trained; the trainer knows everything, and the trainees know nothing; the trainer talks, and the trainees listen; the trainer decides what needs to be learnt, and the trainees learn what has been decided; and finally, the trainer becomes the subject of the learning process with the trainees becoming objects. The aim of training is thus to gift the knowledge and fill the mind of the trainees with the relevant knowledge which they need to memorize and master. Critiques have claimed that what such practices ultimately succeed in doing is lowering the critical consciousness of the trainees, also colloquially referred to as *dumbing down*, with near to total conformity with the official version of the reality as espoused by the organization and the colonization of the self.

Another concern of critical theorists with training practices is that the training is approached from a culturally neutral standpoint. Since the training practices are considered universally true, the practices become monocultural and homogenized in nature, adopting a one size fits all solution. The situation is further exacerbated when training practices become representative of

the hegemony of Euro-Western pedagogical practices [with] unilateral claims to the right to signify certain knowledge and viewpoints as essential elements of a required canon of knowledge ... and to deny the legitimacy of other (usually non-Western) knowledge (Ball & Pence, 2000, p. 22)

and colonize the trainees in one narrow discourse.

In addition to the critical perspectives' theorization discussed above, there is limited poststructural theorization by some scholars in T&D, which is briefly discussed below.

Fox (1989) argued that Foucault's notion of Panopticon<sup>16</sup>, which consisted of unilateral hierarchical observation, normalizing judgment and examination, is present in all management learning activities like management education<sup>17</sup> and training and is further used to discipline the learners in those programs. Trainees are constantly observed by Trainers /administrators both during and often after the completion of training. Although Fox did not discuss, it can be argued that observations also occur in a reverse mode: the trainer is also under constant observation by

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<sup>16</sup> Foucault in his book *Discipline and Punish* (1977) introduced Panopticon. He borrowed this concept from the work of Jeremy Bentham, the founder of utilitarian philosophy. Per Foucault, panopticon was an ideal prison, "a perimeter building in the form of a ring. At the centre of this, a tower, pierced by large windows opening on to the inner face of the ring. The outer building is divided into cells each of which traverses the whole thickness of the building. These cells have two windows, one opening on to the inside, facing the windows of the central tower, the other, outer one allowing daylight to pass through the whole cell. All that is then needed is to put an overseer in the tower and place in each of the cells a lunatic, a patient, a convict, a worker or a schoolboy. The back lighting enables one to pick out from the central tower the little captive silhouettes in the ring of cells. In short, the principle of the dungeon is reversed; daylight and the overseer's gaze capture the inmate more effectively than darkness, which afforded after all a sort of protection." (Foucault, 1980a, p. 147)

<sup>17</sup> Fox uses the term management education in his paper. While there are many who consider management education to be different from T&D, there are others who do not see much difference. Whatever the differences, whether implied or actual, based on my own personal experiences in both sets of activities, I find Fox's discussion on management education is equally relevant for activities labeled as T&D.

the trainees by means of feedback forms among other things. Fox mentioned that various types of normalizing judgment are also at work during these educational activities. Thinking about training, I cannot help but note how trainers are normalized when they are expected to behave in a certain manner, design and use power point slides in the 6 by 6 format, use the specific lines the program designers want to be used, etc.

Garrick (1994) further argued that conventional training in organizations operate under the assumption that “different realities are actually unitary” (p. 127), with trainers being expected to handle learning issues “in the form of competency-based standards, [and] uniform syllabi” (p. 127). He further stressed that trainers might not have independence and are just one more actor engaged in disciplining others (trainees) while the trainers themselves are being produced and disciplined by the modern discourse. Garrick and Solomon (1997), borrowing from Foucault's theorization of technologies of power, discussed training becoming a series of disciplinary instruments enabling new forms of control and surveillance to bring about conformity in the trainees. They discussed how training could be understood using a specific Foucauldian concept—technologies of power—to show how training can become a tool of control and surveillance over trainees at the hands of organizations. They further argued that training become a tool used to design a specific form of employee: disciplined and willing to engage in self-surveillance to ensure that they measure up to the organizational expectations as decided by Management and that trainings’ “disciplinary agenda ... is rarely surfaced” (p. 71). Organizations treat their workers just as another type of resource and use a variety of technologies to control and shape their behavior. Training is just one such technology at the disposal of organizations, which help the organizations enhance production and efficiency,

maintain the status quo in terms of the power structure and help increase wealth for the few that own the business.

In this section, I have discussed the various research paradigms and thereafter briefly discussed the research being carried out in T&D in terms of these paradigms followed by a short discussion of some of the criticism of the T&D field.

As noted earlier in the empirical review of the T&D scholarship, transfer of training has been a key research interest of scholars from the 1990s onwards. While a large proportion of the transfer research has been concerned with the trainees, a small but increasing number of scholars have been interested on the role of trainers in the successful transfer of training. In the next section, I will initially engage with a discussion on transfer of training and thereafter turn attention to my research interest – subject matter expert and train the trainer courses by situating them in the wider conversation of transfer of training.

### **Transfer of Training<sup>18</sup>**

Generally, the T&D literature has stressed that the need for and importance of T&D is no longer in dispute. Since the need and importance are settled issues not in need of any additional deliberation and research, there have been calls for research that focuses on making training effective by on various area of T&D that have well accepted concepts and theories of training, like Baldwin & Ford's model of training transfer (1988); Donald L. Kirkpatrick's hierarchical four level evaluation model (Kirkpatrick, 1998; Kirkpatrick & Kirkpatrick, 2006)<sup>19</sup>; the ADDIE

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<sup>18</sup> Ford, Baldwin and Prasad (2018) defined transfer of training as “the extent to which the learning that results from a training experience transfers to the job and leads to meaningful changes in work performance” (p. 202).

<sup>19</sup> It is a strange state of affairs regarding the Kirkpatrick evaluation model. Despite persistent critique from the 1970s (e.g., Campbell, 1971) right to the present day by academics on the supposed weakness of the model, Kirkpatrick's model has consistently been used all around the world and consistently appears in empirical articles.



model—Analyze, design, development, implement, evaluate model—(Florida State University / US Army); making instructions work (Robert F. Mager); and instructional design (Robert M. Gagné). Following these calls, T&D researchers have focused on issues like transfer of training (e.g., Baldwin & Ford, 1988; Burke & Hutchins, 2007; Ford & Weissbein, 1997; Grossman & Salas, 2011) and have been investigating factors that constitute successful training (e.g., Arthur Jr. et al., 2003; Chen, et al., 2007).

Based on what is known from the scholarship in transfer of training, it is now accepted that for training to be effective, it is necessary that learners transfer training content to their workplace (Burke & Hutchins, 2008). When examining the conditions for successful transfer, researchers have traditionally focused on learners' characteristics, the working environment and the training design (Baldwin & Ford, 1988; Ford et al., 2018). However, in the last two decades, there has been an increase in interest in the persons delivering training since trainers, or more specifically, their knowledge and skills, have been recognized as important transfer factors (Burke & Hutchins, 2008; Donovan & Darcy, 2011; Rasli et al., 2012; Russ-Eft et al., 2010; Towler, 2009). Studies that specifically investigated trainers have asked about their practices (Rohmann et al., 2017); areas of expertise (Hodge & Harvey, 2015), qualifications (Smith & Grace, 2011); (professional) competencies (Gauld & Miller, 2004; Mamaqi et al., 2011); best practices (Burke & Hutchins, 2008), roles, competencies, skills and behaviors (Ricks et al., 2008); core characteristics (Boendermaker et al., 2003); what make trainers effective (e.g., Harris et al., 2014; Chukwu, 2016; Ghosh et al., 2012; Kalargyrou & Woods, 2011); what makes trainers credible ( e.g., Hassi et al., 2011); and how trainers ensure engagement with trainees (e.g., Arghode & Wang, 2016; Beebe, 2007; Brotherton & Evans, 2010; Towler, 2009).

### **Subject Matter Experts<sup>20</sup> as Trainers**

Biech (2008) noted that a trainer is “a person who helps individuals improve performance by teaching, instruction, or facilitating learning” (p. 882). While professional trainers (either working outside or inside the organization) continue to be mobilized in organizational trainings, increasingly organizations are also using subject matter experts to train other staff members (Williams, 2001). Subject matter experts are persons having extensive knowledge and skills of a particular subject area that needs to be taught (Biech, 2008; Piskurich, 2000).

Often in organizations, employees who have mastered particular tasks are moved into training positions for a variety of reasons including their product or process expertise (Thompson, 2001). Increasingly, organizations require staff members who have expertise in their fields to train other staff members (Hughes & Toohey, 1992; Williams, 2001). Scholars have stated that since SMEs have technical expertise, it then enables SMEs to relate better to the technical needs of the learner (Carnevale et al., 1990). According to Trautman and Klein (1993), subject matter experts bring a new dimension to the training process because they have instant credibility in the eyes of the participants and need a shorter preparation time before training delivery, with little or no learning curve on the technical aspects of the training content. Noe (2010) also noted that using SMEs “as trainers may help increase the perceived meaningfulness of the training content. Because they understand the company's business, [SME] trainers tend to make the training content more directly applicable to the trainees' work” (p. 168). On a slightly

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<sup>20</sup> Subject matter experts are discussed differently in the field of Instructional Systems Design (ISD). While SME are still understood as having specialized knowledge, they are not discussed as trainers. Rather, SMEs only provide “subject-specific data and support to the instructional design process” (Hodell, 2016, p. 210) who “who must take responsibility for the accuracy of the facts, concepts, and other content that will be presented” (Branch, 2009, p. 190).

different line of argumentation, it has also been argued that since many organizations have limited financial resources and external trainers are expensive, organizations are increasingly using internal experts to train other staff members (Martin & Hrivnak, 2009; Noe, 2010).

### **Need for SMEs to be Trained**

SMEs who are assigned the responsibility of training may not necessarily have the expertise in the techniques and practices required to train employees effectively (Williams, 2001). SMEs are experts on the content and not necessarily on the best ways to train other employees (Van Buren, 2009). A common link and consistent theme running through the various fields of literature reviewed is that knowledge in the content area does not imply that a person appointed as a trainer will automatically be competent in imparting that knowledge (Kraiger et al., 2015). Piskurich (2000) stated that most novice SMEs train the way they were trained: with a focus on transmitting the details of everything they know and “usually pattern their training technique on their past educational experiences” (Reiss, 1991, p. 4). Since subject matter experts tend to know much more information than they need to convey (Clark, 1994; Trautman & Klein, 1993), there is a high probability that SMEs may overload the trainees with information that is unrelated to job needs (Williams, 2001). This is partly due to the fact that highly skilled performers automate their skills over the years and are therefore unable to accurately explain their actions to others (Polanyi, 1962).

Given that even SMEs who have extensive technical competence, may be ineffective as trainers if they lack professional or personal competencies, they usually will need some form of *instructor training* (Broadwell, 1996, p. 895). Broadwell further noted that “for the most part, good instructors are trained, not born. They are usually picked for their knowledge and experience because that is a foundation to build upon, not a guarantee to success” (ibid). Without

possession of training-related competencies, SMEs might not be able to successfully transfer their technical knowledge to the trainees and therefore possessing skills in instructional planning, instructional delivery, and evaluation of learning is equally important for SMEs (Leach, 1996).

### **Skills Needed for SMEs to Train**

The adult education and T&D literature (both practitioner and academic) have continuously emphasized that SMEs need to have certain knowledge and skills to be effective trainers. Bennett and Leduchowicz (1983) and the International Board of Standards for Training, Performance, and Instruction (1988) studied and defined trainer effectiveness in the context of training and development in order to contribute to improved standards. Similarly, Powers (1992) linked effectiveness with instructor performance by defining instructor excellence in terms of sixty performance standards that defined the consistency with which effective behavior is expected. Recently Wisshak and Hochholdinger (2018) conducted a review of empirical studies from 2000 onwards to identify aspects of knowledge and skills that trainers need and identified forty-one aspects of trainer knowledge and skill as listed in Table 6. Based on the literature review, they conducted a study where the participants were 200 trainers, 253 trainees and 93 human resource development practitioners, to rank these forty-one traits. The results indicated that subject-matter knowledge and communication techniques were considered vital for trainers, along with content-specific instructional knowledge such as specific training methods. Additionally, trainers were expected to provide clarity and structure, build relationships with trainees and create a constructive learning environment. In addition to knowledge and skills, authors like Leach (1996) have also noted that expert trainers need to have some critical personality characteristics like being responsiveness, humorous, sincere, flexible, and tolerant.

**Table 6***Forty-one Aspects of Trainer Knowledge and Skill*

Ranking	Facet of trainer knowledge
1	Subject matter knowledge
2	Providing clarity and structure
3	Communication techniques
4	Subject-specific training methods
5	Building a relationship with trainees
6	Creating a constructive and supportive learning environment
7	Being transparent about learning objectives
8	Explanation knowledge
9	Facilitating training transfer
10	Providing and receiving feedback
11	Motivating trainees
12	Flexibility
13	Designing training
14	Instructional principles of conducting training
15	Tailoring training to trainees' needs
16	Securing active learning time
17	Cognitive activation of trainees
18	Using media and learning material
19	Managing conflicts
20	Consolidating acquired knowledge
21	Practical experience with the training subject
22	Leading groups
23	Instructional methods and their variations
24	Managing heterogeneity
25	Definition of learning objectives
26	Needs analysis
27	Knowledge of learning
28	Knowledge of trainees' ideas about the training subject
29	Consulting
30	Assessment of learning results
31	Coaching
32	Instructional concepts of conducting training
33	Entrepreneurial knowledge
34	Training evaluation
35	Organizational development and change management
36	HR management and HR development
37	Knowing empirical research on training
38	Diagnostics

39	Theoretical foundations of education and pedagogics
40	Research methods
41	National education system

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When the competencies and skills of SMEs are discussed, another important aspect to consider is the structure of training function in the organization. While there are organizations with dedicated training professionals and instructional designers<sup>21</sup> who are responsible for everything in the training process except delivery of the training materials, in many organizations this is not the case. The SME may be required to not only deliver the content but also to plan and design the training and also evaluate the program. The training literature has noted that in absence of dedicated training professionals and instructional designers, SMEs should be able to define the learning objectives based on a needs analysis (Gauld & Miller, 2004) and have sufficient knowledge of instructional concepts and principles to draft a training design that meets trainees' needs (Salas et al., 2012; Smith & Yasukawa, 2017). It has also been noted that since a diverse group of individuals might attend trainings, trainers like SMEs need to be able to communicate appropriately and react with flexibility to changes or disturbances while still providing clarity and structure (Boendermaker et al., 2003; Smith & Yasukawa, 2017). These

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<sup>21</sup> Instructional design refers to the systematic process of translating principles of teaching and learning into plans for learning resources and instructional strategies. Instructional Designer (Instructional Developer) is the person who performs consulting and development tasks necessary to create learning resources. This person (or team) typically gathers and analyzes information about content and skills and determines performance objectives based on the results of information gathered. This person also draft materials and works with media people to assure that all-master materials adhere to the design of the course; organizes the test session and rehearses the instructor and prepares the materials for the reviews required at each stage of the instructional development process. In the last few decades, instructional design has evolved into a field itself with dedicated graduate programs (e.g., Department of Learning, Design, and Technology in University of Georgia), textbooks, journals and conferences.

requirements imply the need for SMEs to be able to create a constructive and supportive learning environment and build relationships with trainees (Arghode & Wang, 2016). Research has also suggested that trainers need to manage individual differences between trainees and address heterogeneity with sensitivity (Arghode & Wang, 2016; Smith & Yasukawa, 2017). Trainers should be familiar with the empirical findings related to their field and know what variables affect transfer and how to apply this knowledge in practice (Burke & Hutchins, 2007), meaning that they should be able to appropriately use different training methods, media and learning material, motivate and activate trainees, and give and receive feedback (Boendermaker et al., 2003; Burke & Hutchins, 2007; Smith & Yasukawa, 2017). Further, trainers should be transparent about the learning objectives, and they must ensure that the acquired knowledge is consolidated before trainees return to their jobs (Burke & Hutchins, 2007; Salas et al., 2012). Review of the literature shows that SMEs are expected to design, deliver and evaluate training programs in the absence of training infrastructure in an organization.

Another important assumption in T&D literature is that since all technical trainers are adult educators, the competencies required of effective adult educators should also be required of the SMEs engaged in training (Williams, 2001). The literature suggests that SMEs need not only possess pedagogical and psychological knowledge of learning in general (Wisshak & Hochholdinger, 2018) but also be conversant in concepts of adult learning (Burke & Hutchins, 2008; Castner & Jordan, 1989; Chance, 1995; Kaeter, 1995; Marsh, 1995; Powers, 1992; Trautman & Klein, 1993; Segall, 1995; Smith & Yasukawa, 2017; Williams, 2001) before they can adequately train others (Williams, 2001).

While organizations require SMEs to train other staff members, SMEs may not have the required pedagogical, psychological and adult learning background. SMEs are thus “often

unprepared [since] little in their educational background or work experience has prepared them for the role of .... trainer” (Kopf & Kreuze, 1991, p. 23). The SMEs’ possible lack of knowledge of adult education principles and training and development methods and techniques can thus present problems for organizations since “ineffective training delivery wastes dollars invested in instructors, training materials, and employee time” (Williams, 2001, p. 92). Thompson (2001) noted that to alleviate these concerns, organizations might require SMEs to be engaged with “resources such as training “how-to” books as well as more expensive and comprehensive “train-the-trainer” workshops [which can help] supply ... adult educators with valid informal information on practice” (p. 9).

### **Train the Trainer**

“Training interventions which prepare employees for the additional role of part-time trainer are called train the trainer courses” (Slurarski, 1998, para 1) and these are normally found in the form of “(1) commercial seminars, (2) books, magazines, and other articles, and (3) programs from schools that may grant certificates or degrees” (Bloom, 2006, p. 65).

Although in the absence of universally recognized standard-setting body the train the trainer materials from different organizations are naturally different, majority of the train the trainer courses have relied “on the same fundamental principles and strategies” (Johnson & Leach, 2001, p. 429) which are grounded in humanistic ideas of adult education (Bloom, 2006). Johnson and Leach (2001) have made a very strong assertion when they claimed that train the trainer courses are based on some fundamental principles. While some T&D academics and practitioners would not completely agree with their claim, review of the literature provides some support for their claim. In Figure 4, I have presented a recent 2019 train the trainer course flyer from ATD which uses a similar language that was used by Tracey in 1974 in his book *Managing*



*Training and Development Systems*. Tracey, in his book had stated that train the trainer programs should ensure attendees understand: how adults learn; how to state objectives and plan learning activities; how to select and use instructional methods and techniques; how to select and use training aids and devices; how to develop lesson plans; how to evaluate training and provide feedback to trainees; and practice of instructional skills under expert guidance.

Review of the train the trainer materials shows that theorization, concepts and models originating directly or indirectly from various adult education scholars in the U.S. has been the foundation on which train the trainer materials rests. For example, the train the materials almost without exception refer to andragogy, a term popularized by Malcom Knowles (1970, 1990) in the U.S. Brookfield (1986) argued that andragogy has been “the single most popular idea in the education and training of adults” (p. 91). Many of andragogical principles (summarized below) can be found embedded in many professional development courses, though they are often not explicitly expressed. Nearly fifty years ago Malcolm Knowles (1968) proposed a “new label and a new technology” (p. 351) of adult learning to distinguish it from preadult schooling.

Andragogy, meaning “the art and science of helping adults learn”, was contrasted by Knowles with pedagogy, the art and science of helping children learn (Merriam et al., 2007). Knowles theorization was built on the work of humanist philosophers like Eduard Lindemann, Carl Rogers, and John Dewey (Nicolaidis & Marsick, 2016). Andragogy is based on six assumptions (Knowles et al., 2005): 1) the need to know: adults need to know why they need to learn something before undertaken to learn it thus when adults undertake to learn something on their own, they will invest considerable energy in probing into the benefits; (2) the learners self-concept: adults have a self-concept of being responsible for their own decisions, for their own lives. They resent and resist situations in which they feel other are imposing their will on them;

(3) the role of the learner's experiences: adults come into an educational activity with both a greater volume and a different quality of experience thus warranting experiential techniques that tap into the experience of the learners; (4) readiness to learn: adults become ready to learn those things they need to know and be able to do in order to cope effectively with their real life situations; (5) orientation to learning: in contrast to children's subject centered orientation to learning, adults are life centered (or task centered or problem centered) in their orientation to learning. They learn new knowledge, understandings, skills, values, and attitudes most effectively when they are presented in the context of application to real-life situations; and (6) motivation: adults are responsive to some external motivators (better jobs, promotions, higher salaries and the like) but the most potent motivators are internal pressures (the desire for increased job satisfaction, self-esteem, quality of life and the like). This view of Knowles that adults need to be treated differently and without whose active participation, learning will not take place as desired is also substantiated by other authors like Pratt (1988) and organizations like World Bank (2008).

Further, train the training materials are structured in ways that exhibit strong influences of work originating from scholars like Eduard C. Lindeman (1926) – respecting the needs of adult learners and self-directed learning; John Dewey (1938) – experience and experiential learning; David A. Kolb (1984) – learning styles inventory based on Kurt Lewin's and John Dewey's experiential learning model. Reflective of the ideas espoused by these scholars, majority of train the training materials claim that by the end of the train the trainer courses, an attendee should be able to apply principles of adult learning; establish and maintain a positive learning climate; present information and answer questions effectively; use appropriate learning styles based on the profile of trainees and be able to conduct and debrief learning exercise

(Bloom, 2006). However, not all the train the trainer materials explicitly cite or refer to the above theorist in their materials. These authors simply mention that the train the trainer materials are guided by adult learning principles giving the impression that there is a uniform agreement on what adult learning principles and theories are. Scholars have noted that there are a diverse set of adult learning theories (Nicolaidis & Marsick, 2016) and that “there is no single theory of adult learning” (Merriam et al., 2007, p. 83). In addition to the adult theories relying on humanist ideas there also exists a substantial corpus of literature from critical/poststructural theorization (Nicolaidis & Marsick, 2016): Brookfield (e.g., 1986, 1987), Mezirow (e.g., 1978, 1981, 1985), Freire (e.g., 1980, 1985) and Kang (2007) who differ from scholars like Lindeman and Knowles.

As noted earlier train the trainer courses differ amongst different providers, however almost all of the courses have many similar components as shown in the next page.

**Figure 4**

*Modules in ATD's Train the Trainer course*



As can be noted from the figure above, the content of train the trainer courses address most of the requirements that the literature states that SMEs need: ability to assess training needs; ability to design and prepare training material based on adult learning principles; ability to establish a learning environment and manage challenges that adults bring to the training room; and be able to evaluate the training programs.

As can be noted in Module 3 in the above figure (*Skills Practice Activity*), many of the train the trainer courses also have a component where the attendees will be required to prepare a

mini-lesson based on what has been taught to demonstrate that the train the trainer materials have been internalized by the attendee. Successful demonstration at the end of the program normally leads to the attendees earning “a certificate that verifies they have the skills needed to be effective trainers” (Noe, 2010, p. 167).

### **Summary**

In this chapter, I have defined and discussed various aspects of T&D including the evolution and influences on the T&D. Leading T&D scholars have concluded that there exists a science of T&D, training works and that there are correct ways of training. Based on these understandings, T&D scholarship has shifted its concern towards transfer of training and researchers are increasingly focused on identifying, understanding and managing factors that impact the success of trainings. While a large portion of the transfer of training literature has historically focused on trainees, subject matter experts who might design, deliver and evaluate trainings have slowly been an area of research interest. Review shows that an almost uniform understanding exists with regards to subject matter experts needing to be trained through train the trainer courses. The review leads me to assert that logical positivism seems to be the dominant paradigm undergirding the T&D field and T&D concepts and practices have become common, normal and commonsensical.

## CHAPTER 3

### FOUCAULDIAN HISTORIOGRAPHICAL ANALYTICS

*I do not have a methodology that I apply in the same way to different domains. On the contrary, I would say that I try to isolate a single field of objects, a domain of objects, by using the instruments I can find or that I forge as I am actually doing my research, but without privileging the problem of methodology in any way.*  
(Foucault, 1997/2003)

In this chapter, I will first introduce the concept of poststructuralism and discuss it along with structuralism. I then proceed to introduce Michel Foucault and two of his analytics- archaeology<sup>22</sup> and genealogy. Against this background I will then discuss how my research interest emerged while reading Foucault and provide a succinct discussion on my evolving plans to engage with my research interests while thinking and being inspired by Foucauldian archaeology.

### **Poststructuralism**

Philosophers like Jacques Derrida and Michel Foucault among many others, through their work, have facilitated what is normally labeled as the “linguistic turn” (Delanty & Strydom, 2003, p. 321). Their work has resulted in far reaching consequences across a range of fields in how research activities are conceptualized and operationalized. These shifts have resulted in

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<sup>22</sup> The first point that is important to understand about Foucault's archaeological method is that it is not directly related to the academic discipline of archaeology, that is, the study of past cultures. As Foucault (1969/1972) says on this subject in *The Archaeology of Knowledge*, his archaeology "does not relate analysis to geological excavation" (p. 131).

persistent questions being raised about a large number of commonly accepted concepts in the social sciences and how research activities are conceptualized and operationalized.

One reason for lack of poststructuralism might be the difficulty to explain in a quick and succinct manner what poststructuralism is. It should be noted that defining postmodernism and poststructuralism by listing its *essential nature, essence, underlying assumptions, it's meaning* for the purpose of *making it definite and clear* is akin to engaging in a “fool’s errand” (Prasad, 2005, p. 250). Definitions are definite, absolute and clear usually with singular meanings, which were the very notions philosophers currently classified as the Poststructuralists like Jacques Derrida, Michel Foucault, Gilles Deleuze came out against in their own unique ways. The matter becomes slightly muddier when it is noticed that “the terms poststructuralism and postmodernism are sometimes used interchangeably” (St. Pierre, 2000, p. 506) and sometimes even used to denote anything that is not positivistic in nature (St. Pierre, 2012). “However, there are acknowledged differences in their meaning” (St. Pierre, 2000, p. 506), with “the term *postmodernism* ... usually used to describe the *avant garde* in the arts and culture and *poststructuralism* to describe academic, theoretical critiques of structuralism” (St. Pierre, 2012, p. 496). Lather (1992) provided some more clarification when she stated,

I generally use the term *postmodern* to mean the shift in material conditions of late 20th century monopoly capitalism brought on by the micro-electronic revolution in information technology, the fissure of a global, multinational hyper-capitalism, and the global uprising of the marginalized...The code name for the crisis of confidence in western conceptual systems, postmodernism is borne out of our sense of the limits of Enlightenment rationality...and use *post-structural* to mean the working out of academic theory within the culture of postmodernism. (p. 90)

## Structuralism and Poststructuralism

A better appreciation of poststructuralism can be had if the general background of structuralism is first discussed. Structural and poststructural traditions have a French origin. Numerous French philosophers since Emile Durkheim have been concerned with structure (Delanty & Strydom, 2003). However, it is with Ferdinand de Saussure's work that language and structure came together in a unique manner. Weedon (as cited in St. Pierre, 2000) mentioned that,

Saussure theorized language as an abstract *system*, consisting of chains of signs...made up of a signifier (sound or written image) and a signified (meaning) related to each other in an arbitrary way and there is therefore no natural connection between the sound image and the concept it identifies. The meaning of signs is not intrinsic but relational. Each sign derives its meaning from its difference from all the other signs in the language. (p. 481)

de Saussure further theorized that "all of reality is essentially mediated by language, which accordingly is a social entity." (Delanty & Strydom, 2003, p. 321). This line of theorization subsequently led to claims of language not having any place for human agency as "the human actor is merely the voice through which language speaks... draw[ing] from pre-existing linguistic codes" (p. 321). Delanty and Strydom (2003) mentioned that it was Claude Lévi-Strauss who further developed the structural ideas of structural linguists and made it popular outside the field of linguistics. Lévi-Strauss argued that all structures were mediated by language and "saw [all] social relations...shaped by relations of exchange, not unlike the basic structures of language" (p. 322). Lévi-Strauss successfully used structural linguistic methods in his own works, and his reiterations led to the belief that structural linguistics was "a rigorous scientific



method that does not require hermeneutic interpretation, since what is being studied is not subjectively or intersubjectively created meaning but structures of meaning which can be uncovered with almost mathematical precision” (p. 326). His work made some radical suggestions like:

the modern forms of classification are nothing but variations of some basic codes out of which all of civilization is constructed...[which then challenged]..the idea of progress and the triumph of the human will...[and allowed]...escaping from the humanist assumptions of the older approaches, such as the view that history has a meaning, that history is the narrative of a subject and that the sciences of man can reveal the truth of the historical meaning contained in the unfolding of this narrative. (Delanty & Strydom, 2003, p. 322)

Foucault (1971/1984b) had pointed out that that humanism is not an error and therefore “we must not conclude that everything that has ever been linked with humanism is to be rejected, but that the humanistic thematic is in itself too supple, too diverse, too inconsistent to serve as an axis for reflection” (p. 44). Foucault had concluded this after critiquing and deconstructing most aspects of humanism in his work. St. Pierre (2000) elaborated on humanism, describing it as, the air we breathe, the language we speak, the shape of the homes we live in, the relations we are able to have with others, the politics we practice, the map that locates us on the earth, the futures we can imagine, the limits of our pleasures. Humanism is everywhere, overwhelming in its totality; and, since it is so ‘natural,’ it is difficult to watch it work. Berbary (2017) noted that

humanism is a grouping of ideas that have over time preserved notions of essentialism, the proverbial “tree of knowledge,” universal/ meta-narratives of human progression, binary structures, the ability to capture reality, common sense, the agentic subject, and foundational Truth(s) (Barad 2007; Braidotti 2013; Flax 1990; Foucault 1984a). Because

these concepts represent many of our fondest attachments, humanism is difficult to locate (St. Pierre 2000). It is the ‘template’ in our lives that we fail to recognize even as it invisibly organizes our existences through taken-for-granted orientations (Amed 2006), modes of production (Marx 1977), ideological state apparatus (Althusser 1971), false needs of consumption, and other coordinations of power (Marcuse, 1964). (p. 478)

Not surprisingly humanistic assumptions are strongly rooted in both interpretive and critical research traditions and methodological textbooks with a few exceptions rarely discuss these issues. In Table 7, I present Aghasaleh and St. Pierre’s (2014) comparison of how common research concerns are understood very differently in conventional and post research.

**Table 7**

*Comparison of Conventional Qualitative and Post-Qualitative Research*

	Conventional Qualitative Research	Post-qualitative Research
Paradigm	Humanism	Post-humanism
Ontology	Hierarchical knower (agentive human)/ language (transparent representation)/ known (passive reality)	Flattened knower, language, and the known are all agentive and materially and discursively constructed
Goal	Understand (interpretivist, naturalistic, etc.) Emancipate (critical, Neomarxism, Praxis, etc.)	Deconstruct (persistent critique of something you cannot not want.)
Subject	<i>Human</i> voice	The <i>structure</i> in which this voice is produced and reproduced.
Beginning	Method (ethnomethodology, phenomenology, etc.)	Theory (genealogy, deconstruction, archaeology, marginality, performativity) or concept (assemblage, intra-action)
Data Collection	Interview, Participant Observation	Intra-action with texts, human, non-human, etc.
Analysis	Coding	Thinking and Writing
Contributions to the Literature	Accumulation of knowledge	N/A
Limitations	Generalizability, Validity, Subjectivity	N/A

While interpretive and critical research traditions draw heavily from various humanistic assumptions, it is rare to find philosophical discussions in textbook that trace many of humanistic cherished ideals like rationality and coherent self to the Enlightenment period in Europe. Lather and St. Pierre (2013) have argued that the paradigms of positivism, interpretivism and critical theory have shared common understanding about “several key philosophical concepts – language; discourse; rationality; power, resistance, and freedom; knowledge and truth; and the subject” (St. Pierre, 2000, p. 477). It is only when one moves to the paradigm of post theories that a *break* occurs from modernist, structural, humanist theories/discourses and the concepts discussed earlier can be thought differently. In Table 8, I provide Bronwyn Davies’ 1991 analysis of how a *person* can be understood differently in humanism and poststructuralism.

**Table 8**

*Concept of Person in Humanist and Poststructuralist Theories*

Humanism	Poststructuralism
Any sane, adult individual has identity. This identity is continuous, unified, rational and coherent. Language is used by individuals to describe or analyse the real world. The language itself is a transparent tool for the achievement of such descriptions and analyses. Conscious, rational, linguistic processes are used by the individual to dominate those irrational, emotional aspects of self that might otherwise disrupt claims to coherent adult identity.	The experience of being a person is captured in the notion of subjectivity. Subjectivity is constituted through those discourses in which the person is being positioned at any one point in time, both through their own and others' acts of speaking/writing. One discourse that contradicts another does not undo one's constitution in terms of the original dis course. One's subjectivity is therefore necessarily contradictory. It is also to some extent outside of or larger than those aspects of being which come under rational or conscious control.
The choices that the individual makes are based on rational thought and are thus coherent choices that signal the coherence and rationality of the individual. People who do not make choices on this basis are regarded as faulty or lacking in some essential aspect of their humanness.	The choices that the individual makes may be based on rational analysis, but desire may subvert rationality. Desires are integral to the various discourses through which each person is constituted and are not necessarily amenable to change through rational analysis. Subject positions which individuals may take up are made available through a variety of discourses.

Humanism	Poststructuralism
<p>The individual is socialised in the first instance by the collective. Society's norms and values are internalised and become part of the individual. The individual is understood, nonetheless, within the terms of the individual/collective dualism - that is, the essence of the individual is precisely that which the collective is not. To "follow the crowd" is to have failed to establish one's own identity. To stand apart and to assert oneself in the face of the crowd is to have had particular success as an individual. Continuity of identity is understood as arising from early socialisation and internalisation of the values through which one was socialised.</p> <p>Stories are versions of events that occur in the real world. An important distinction is that between "true" and fictional stories.</p>	<p>One subject position, more often made available to white middle-class males than to others, is of the agentic person who can make rational choices and act upon them.</p> <p>The concepts of the individual and the collective are not understood in terms of a dualism. The individual is constituted through the discourses of a number of collectives as is the collective itself. One can only ever be what the various discourses make possible, and one's being shifts with the various discourses through which one is spoken into existence. The individual or heroic "I" is understood as a discursive construction, not stemming from the particular characteristics of that person but from the subject position made available to her/him. Fragmentation, contradiction and discontinuity, rather than continuity of identity, are the focus. However, continuity is recognised as existing and is as yet inadequately theorised.</p> <p>Investment in particular discourses, embodiment, and the material force of the discourses through both individuals and social structures of which we are constituted are the major explanations of the experience of continuity.</p> <p>Stories are the means by which events are interpreted, made tellable, or even liveable. All stories are understood as fictions, such fictions providing the substance of lived reality.</p>

Although both de Saussure and Lévi-Strauss brought about fundamental and radical ways of thinking, their own respective thoughts were again challenged by philosophers labeled poststructuralists. For example, Derrida accepted "de Saussure's idea of no correspondence between a word and a thing, that signs have no intrinsic meaning but obtain meaning because of their difference from other signs in the language chain" (St. Pierre, 2000, p. 481). Derrida was to

claim that such signs had a logocentric<sup>23</sup> nature. To counter this, Derrida introduced the concept of *différance*:

to explain how the meaning of language shifts depending on social context so that meaning can always be disputed...[and]...since meaning must always be deferred, we can never know exactly what something means – we can never get to the bottom of things. (St. Pierre, 2000, pp. 481-482).

Jackson and Mazzei, 2012) aptly noted that:

both structuralism and poststructuralism share the basic assumption that language is not a medium of expression – that language produces rather than reflects reality... However, poststructural theories ... *radicalize* some of the basic tenets of structuralism .... poststructuralism critiques ahistorical, inherent, coherent structures (as defined by structuralists) that possess stable centers, origins, and foundations. Poststructural theories ... *reconstruct* structural centers as unstable, contingent, situational and historical. (p. 70)

### **Michel Foucault - Historian of Thought**

From the 1960s when he first published his academic scholarship, Foucault has been an enigma to not only *professional* philosophers and historians but to all variety of academics and non-academics in both Anglophone and Francophone worlds (O'Farrell, 2005). He has been criticized by philosophers for not being philosophical enough, by historians for not being historical enough and by all variety of people of being neither a historian nor a philosopher. Alan Sheridan (1980/1990) has captured some of the overall confusion about Foucault as evidenced in the following imaginary conversation:

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<sup>23</sup> Logocentrism emphasizes the privileged role that *logos*, or speech, has been accorded in the Western tradition.

‘Is he some kind of philosopher?’ people ask. ‘Well, yes, in a way,’ one answers. ‘He studied philosophy and has spent much of his adult life teaching it.’ ‘Then why does he write not about Plato, Descartes and Kant, but about the history of madness and medicine, prisons and sexuality?’ ‘Well, he is more of a historian than a philosopher, though his approach to his material is very different from that of a historian.’ ‘Ah, a historian of ideas!’ ‘Well, no.’ He has spent a lot of time and energy undermining the preconceptions and methods of the history of ideas.’ (p. 2).

Sheridan clarified that “in fact, it was to distinguish what he [Foucault] was doing from the history of ideas that he coined the term “archaeology of knowledge”.’ (p. 2) in his book by the same name. In contrast to historians looking at either the history of events and/or ideas, Foucault was interested in the history of thoughts (Gutting, 1989). Sheridan noted that, “for Foucault, history —and the ‘history of ideas’ in particular— [was] too deeply imbued with notions of continuity, causality and teleology, which stem[ed] from modern rationalism and ultimately from the Cartesian notion of the constitutive subject” (p. 13). Foucault, as a *historian of thought*<sup>24</sup>, was engaged in a “non-subject centered” (Gutting, 1989, p. 229) historical work that eliminated “the fundamental role of the human subject” (p. 228).

Scholars have noted that Foucault’s historiographical inquiries had three different phases: archaeology, genealogy and ethics (O’Farrell, 2005; Oksala, 2005; Prado, 2000; Scheurich & McKenzie, 2005). In his archaeological phase, he authored *Madness and civilization* (1961/1965), *The birth of the clinic: An archaeology of medical perception* (1963/1973), *The order of things: An archaeology of the human sciences* (1966/1970), and *Archaeology of*

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<sup>24</sup> Foucault became a professor in the prestigious Collège de France in 1969 and held the position till his death in 1984. During his tenure he held the title Professor of the History of Systems of Thought (Gutting, 2005).

*knowledge and the discourse on language* (1969/1972). In his genealogical phase, he authored *Discipline and punish: Birth of the prison* (1975/1977) and *The history of sexuality, Vol. 1: An introduction* (1976/1978). In his ethical phase, he authored *The history of sexuality, Vol. 2: The use of pleasure* (1984/1990) and *The history of sexuality, Vol. 3: The care of the self* (1984/1986). Davidson (1986) noted that in his archaeological, genealogical and ethical phases, he focused on “an analysis of systems of knowledge, of modalities of power, and of the self’s relationship to itself” respectively (p. 221). In his ethical analysis<sup>25</sup>, he focused “on the arts of existence, or technologies of the self, that people use[d] to create themselves as the ethical subjects of their actions” (St. Pierre, 2000, p. 258).

### Archaeology

*...what if empirical knowledge, at a given time and in a given culture, did possess a well-defined regularity? If the very possibility of recording facts, of allowing oneself to be*

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<sup>25</sup> According to St. Pierre (2004),

Foucault originally announced that his *History of Sexuality* would be a six-volume study concentrating "on the eighteenth and nineteenth centuries, and including volumes on women, children, and pervers" (Davidson, 1986, p. 230). Its purpose was "to define the regime of power-knowledge-pleasure that sustains the discourse on human sexuality in our part of the world" (Foucault, 1976/1978, p. 11). However, Foucault's interests changed after he completed the first volume, and he began to write a new series of books that focused on a different kind of subject, one that had appeared about 2000 years earlier in "Greco-Roman culture, starting from about the third century B.C. and continuing until the second or third century after Christ" (Foucault, 1983/1984, p. 359), thus serving the Greeks for about 600 years. Three volumes of the history of sexuality were eventually published. Volume One, *History of Sexuality: An Introduction*, the first book in the six-volume study he abandoned, is similar to his other genealogies and examines sexuality in the eighteenth and nineteenth centuries. The second volume, *The Use of Pleasure* (1984/1985), and the third volume, *The Care of the Self* (1985/1986), are the first two volumes of the new series, and they examine care of the self for the ancient Greeks. In his biography of Foucault, Macey (1993) explains that the fourth volume, *The Confessions of the Flesh*, which would have been the third volume of the new series, was actually the first book Foucault wrote in the new series, though he never finished it. Foucault died in July 1984 before completing *Confessions of the Flesh*. (pp. 334-335)

Contrary to expectations that *The Confessions of the Flesh* would never be published, the final volume of the *History of Sexuality* was published in 2018 in French and was translated into English in 2021.

*convinced by them, of distorting them in traditions or of making purely speculative use of them, if even this was not at the mercy of chance? If errors (and truths), the practice of old beliefs, including not only genuine discoveries, but also the most naive notions, obeyed, at a given moment, the laws of a certain code of knowledge? If, in short, the history of non-formal knowledge had itself a system?*  
(Foucault, 1966/1970, p. ix)

In his first two books relating to madness and medicine respectively, Foucault discussed how madness and medicine were thought of, talked about and understood in sharply distinct manners in different periods in the Western world. Based on these works in the sciences, he then looked at three distinct discourses<sup>26</sup> in the *empirical sciences*<sup>27</sup> relating to living beings, language and wealth during classical and modern period in his third book – *The Order of Things*. While in the classical period, wealth was studied under *analysis of wealth*, living beings under *natural*

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<sup>26</sup> According to Foucault (1969/1972), discourses are “practices that systematically form the objects of which they speak” (p. 49). Burr (2015) explained that, by this statement, Foucault “refer[red] to a set of meanings, metaphors, representations, images, stories, statements and so on that in some way together produce a particular version of events” (pp. 74-75). Per Bové (1990),

‘Discourse’ provides a privileged entry into the poststructuralist mode of analysis precisely because it is the organized and regulated, as well as the regulating and constituting, functions of language that it studies: its aim is to describe the surface linkages between power, knowledge, institutions, intellectuals, the control of populations, and the modern state as these intersect in the functions of systems of thought. (p. 55)

Thus discourse

constructs the topic. It defines and produces the objects of our knowledge. It governs the way that a topic can be meaningfully talked about and reasoned about. It also influences how ideas are put into practice and used to regulate the conduct of others. (Hall as cited in Burr, 2015, p. 79)

Echoing this sentiment, St. Pierre (2002) mentioned

once a discourse becomes “normal” and “natural”, it is difficult to think and act outside it. Within the rules of a discourse, it makes sense to say only certain things. Other statements and others ways of thinking remain unintelligible, outside the realm of possibility. (p. 485)

<sup>27</sup> Per Foucault, the human sciences do not include biology, economics and the science of language. These are the *empirical sciences* and the mathematical and physical sciences are the *deductive sciences*.



*history*, and language under *general grammar*, in the modern period, wealth was studied under *political economy*, living beings under *biology*, and language under *philology*. Sheridan (1990) stated that Foucault based on his earlier work on madness and medicine was in fact working on the hypothesis that all the intellectual activity of a certain period obeyed the laws of a certain code of knowledge. That then meant “mutation around 1800 that occurred in the history of medicine” (p. 47) could also possibly be present in the discourses of living beings, language and wealth. In *The Order of Things*, Foucault was able to illustrate how while *analysis of wealth/political economy* were concerned with wealth, *natural history/biology* with living beings, and *general grammar/philology* with language in the classical and modern periods respectively, each of these pair were not logical progression from the classical to the modern period. The pairs while concerned with the same subject were not the same discipline, rather “the three nineteenth-century disciplines would reveal common underlying structures that were quite alien to their three eighteenth-century predecessors” (p. 47). The fields of living beings, language and wealth in the classical and modern period had distinctly different underlying *archaeological* systems consisting of “a set of rules of formation<sup>28</sup> that determine the conditions of possibility of all that can be said within the particular discourse at any given time.” (p. 47).

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28 Archaeology is concerned with describing discursive regularities (or rules of formation) in fields of knowledge. These regularities refer to the way objects are defined, the way concepts are ordered, and the way diverging theories are constructed within a body of literature in the human sciences. For example, in the *History of Madness*, Foucault examined medical reports, clinical examinations, criminal typologies, and penal codes to show how the object of madness was defined in the field of psychopathology. Foucault sought to describe the rules of formation for objects, concepts, and theories in order to determine how a field of knowledge construed for itself an entire series of true statements that remained valid and reproducible within the field over time. These, then, were the discursive regularities in a body of practitioner literature to which the archaeological method directed its attention; by mapping them out, Foucault was able to say what a specific discursive formation – such as psychopathology, natural history, or analysis of wealth was. Foucault also noted the fluid inter-relationship between discursive formations: the ways

What was common to the natural history, the economics, and the grammar of the Classical period was certainly not present to the consciousness of the scientist; or that part of it that was conscious was superficial, limited, and almost fanciful (Adanson, for example, wished to draw up an artificial denomination for plants; Turgot compared coinage with language); but, unknown to themselves, the naturalists, economists, and grammarians employed the same rules to define the objects proper to their own study, to form their concepts, to build their theories. It is these rules of formation, which were never formulated in their own right, but are to be found only in widely differing theories, concepts, and objects of study, that I have tried to reveal, by isolating, as their specific locus, a level that I have called, somewhat arbitrarily perhaps, archaeological. Taking as an example the period covered in this book, I have tried to determine the basis or archaeological system common to a whole series of scientific 'representations' or 'products' dispersed throughout the natural history, economics, and philosophy of the Classical period. (Foucault, 1966/1970, p. xii)

Gutting (2014) stated that the "premise of archaeological method is that systems of thought and knowledge are governed by rules...that operate beneath the consciousness of individual subjects and define a system of conceptual possibilities that determines the boundaries of thought in a given domain and period" (para. 26).

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discourses intersect, abut, compete, overlap, dominate, marginalize or negate one another. Foucault argued that these interactions between discourses needed to be explored at a microscopic level (between subjects, objects, strategies and concepts), and at a macroscopic level (between discursive formations, competing knowledges and power effects).

## Genealogy

While archaeology allowed a glimpse into the discursive formations<sup>29</sup> of a specific period, it did not tell much about the "causes of the transition from one way of thinking to another"(Gutting, 2014, para 28) which his next analytic – genealogy attempted to do. Foucault (1980b) mentioned that the role of genealogy<sup>30</sup>, his other analytic was to “attempt to emancipate historical knowledges from that subjection, to render them, that is, capable of opposition and of struggle against the coercion of a theoretical, unitary, formal and scientific discourse” (p. 349). According to Gutting (2014)

the point of a genealogical analysis is to show that a given system of thought (itself uncovered in its essential structures by archaeology, which therefore remains part of Foucault's historiography) was the result of contingent turns of history, not the outcome of rationally inevitable trends. (para 29)

Sanford (2012) mentioned that while there has not been any blueprint for a Foucauldian genealogy, Foucault “did provide some guidelines” (p. 17) on engaging with genealogy. Unlike traditional history, the starting point for effective history’s analysis is not, according to Foucault (1988), an originating event in the past but “a question posed in the present” (p. 262). So, while “in a traditional historical study, the historian seeks to discover the plot line, the narrative, of a past event with the beginning, the middle, and then the end of that event’s story” (Sanford, 2012,

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<sup>29</sup> Discursive formations define a discursive field, or the totality of all effective statements (whether spoken or written), and a discursive field encompasses every form of practice that systematically forms the objects of which it speaks (Foucault, 1969/1972). In a discursive formation, knowledge is formalized in a body of practitioner/academic literature and displays a certain regularity and coherence as a discourse.

<sup>30</sup> It should be noted that Foucault (1977) also identified his genealogical approach as effective history.

pp. 8-9), the genealogical historian starts in the present, then traces the lines of descent from the present to the events that made that existence of certain truths possible. Per Foucault (1984a):

‘Effective’ history, however, deals with events in terms of their most unique characteristics, their most acute manifestations. [Within ‘effective history,’] an event, consequently, is not a decision, a treaty, a reign, or a battle, but the reversal of a relationship of forces, the usurpation of power, the appropriation of a vocabulary turned against those who had once used it, a feeble domination that poisons itself as it grows lax, the entry of a masked ‘other.’ (p. 88)

Sanford (2012) further explained the above when she stated that

once the genealogist draws the lines of descent to events, the genealogist then looks for an emergence, which Prado (2000) summarized as an ‘appearance or advent enabled by collisions of forces’ (p. 37). Foucault (1977) took the word *emergence* from the German term *Entsehung*, which he defined as ‘the moment of arising’ (p. 148). An emergence is what a network of events makes possible. Prado (2000) wrote that possibilities for what can emerge include ‘value-sets, institutions, such as representative government, disciplinary constructs like ‘human sexuality,’ and concepts such as that of inalienable rights and of historical inevitability’ (p. 37). What emerges are the taken-for-granted concepts that seem ahistorical. Once something emerges, however, its history is not completed; it continues to become. According to Foucault (1977), emergences do not denote ‘the final term of an historical development’ (p. 148). They indicate not an ending but a becoming. Prado (2000) posited that ‘what emerges and gains dominance is everything that orders our lives and which appears natural to us in those lives.’ (p. 37)

Effective histories thus help identify the historical discontinuities that have led to the current understandings about a concept and lay bare that the current understandings about a concept are not a result of a linear, natural and rational process.

Using genealogy, the historian searches meticulously for perhaps random turns of history, chance, and accident that mark the transition from one way of thinking to another. Foucauldian genealogy rejects the existence of a single past event as the origin of apparently inevitable or commonsense ideas. Davidson (1986) wrote that “as any reader of Foucault learns, [genealogy] shows rather that the origin of what we take to be rational, the bearer of truth, is rooted in domination, subjugation, the relationship of forces – in a word, power” (p. 225).

### **Archaeology and Genealogy**

Davidson (1986) has referred to archaeology and genealogy as “the two best-known key words of Foucault’s so-called methodology” (p. 221). Both are historical analytics that differ from traditional historical analyses by rejecting inevitability and the ahistoricism of what are often considered natural or commonsense concepts. According to Prado (2000), the point of Foucault’s archaeology and genealogy was to “retell the history of a discipline or institution or practice. He highlight[ed] and connect[ed] previously marginal and obscured elements and events, thereby presenting a very different picture of that discipline, institution, or practice” (p. 25). Each analytic accomplishes this retelling by exploring the discursive production of disciplines and what they enable. Using these approaches, Foucault looked at diverse concepts like madness, prison, and sexuality, showing that today’s questions can be answered only when the past is understood and that any given truth is only a temporary reflection of its own unique “social and historical ‘situatedness’” (Cheek, 2004, p. 1144).

Foucault's genealogy is not completely different from his archaeological work, and both work more like two stages of one process rather than two different methods. St. Pierre (2000) explained the relationship of archaeology and genealogy: "If Foucault's archaeology examines the relation between truth and knowledge, his genealogy examines the relation between truth and power" (p. 497). Similarly, Davidson (1986) also pointed out that "genealogy does not so much displace archaeology as widen the kind of analysis to be pursued" (p. 227). Archaeology widens from "rendering problematic what is least questioned, by reconstructing the apparently obvious and natural as suspect" (Prado, 2006, p. 75) to genealogy where "we find truth, knowledge, and rationality reconceived as products of power" (p. 76). Perhaps more importantly, genealogy is an investigation of how we ourselves are produced. As Mahon (1996) wrote, "genealogy is critique as a historical investigation into the events that have led us to constitute ourselves and to recognize ourselves as subjects of what we are doing, thinking, saying" (p. 122). Foucault (1980c) posited that

‘Truth’ is to be understood as a system of ordered procedures for the production, regulation, distribution, circulation and operation of statements . . . ‘truth’ is linked in a circular relation with systems of power which produce and sustain it, and to the effects of power which it induces and which extend it. A régime of truth. (p. 133)

Davidson (1986) observed that the first line of the above quotation from Foucault was Foucault's "own succinct retrospective interpretation of his archaeological method" (p. 221) while the second line was Foucault's interpretation of "his genealogical method" (p. 221). Foucault's archaeological works attempted to examine the production of truth by looking at the language within discourses and its role in the production of truth. His genealogies added an analysis of the

productive and disciplinary effects of those discourses (Bové, 1990). Critiquing discourse's disciplinary effect is the work of genealogy.

Prado (2000) noted the subtle difference of role of discourse in archaeology and genealogy: "shift from archaeological analysis, in which discourse is deemed to shape practice, to genealogical analysis, in which discourse and practice are deemed to shape one another" (p. 24). While Foucault's (1980b) archaeology focused on the "analysis of local discursivities" (p. 85), Bové (1990) stated that genealogy, on the other hand,

tries to get hold of this power that crosses discourses and to show that it is, among other things, the power that makes possible and legitimate certain kinds of questions and statements. It is, in other words, the power to produce statements which alone can be judged "true" or "false" within the knowledge/power system that produces "truth" and its criteria within a culture. (p. 57)

Despite having similar goals, then, archaeology and genealogy have a different focus, particularly in terms of power. Foucauldian genealogy focuses on power both in terms of what makes certain discourses possible and in terms of what they have the power to produce. Foucault's interrogative ways thus undermine taken for granted assumptions about institutionalized practices, providing space for alternate understandings. His works also illuminated how power has changed its nature from the traditional sovereign nature during medieval times to more of a disciplinary nature in the modern society and how power and discipline in unobtrusive ways have become a mainstay in shaping discourses in almost all arenas of the contemporary society. His work, by analyzing the power relationships in wider society and individual practices, has revolutionized the ways we examine self, institutions and

societies and theoretical perspectives drawing from his work currently informs scholarship in diverse areas like sociology, linguistics, organizational human relations among others.

In this section, I have discussed two Foucauldian analytical tools – archaeology and genealogy. In the next section, I will discuss how my research interest emerged and my plans on engaging and thinking with Foucauldian inspired archaeology in my dissertation.

### **Emergence of My Research Interest**

In Foucauldian inquiries (mainly doctoral dissertations, e.g., Collins, 2013; Tisdale, 2003) that I reviewed, researchers were interested in topics that they were well versed in, and which the researchers had previously considered as culmination of a natural progression of historical events. For example, Collins (2013) mentioned:

as both a student and a teacher, I became both product and producer of those rites of passage that appeared to be inevitable, natural, and logical manifestations of academic excellence. It seemed impossible to think of the process in any other way until I began my doctoral program. (p. 1)

As noted by Collins, other scholars have also claimed that they became aware of the role of discourses and how their practices had been governed by discourses only when they started sustained and careful reading (Butler, 1995) of various theories in their doctoral programs. Jackson and Mazzei (2012) would argue that these three authors were *thinking with theory*; thinking with the help of specific theorist's certain concepts instead of theoretical frameworks like critical theory and poststructuralism. Thinking with theory and “putting philosophical concepts to work” (p. 5)— archaeology and genealogy—allow scholars to engage in “different ways of thinking ... [and ask] ... new questions” (p. 9) about a diverse range of issues.



Before coming to my current doctoral program, I worked in Commercial Banks for a little more than eighteen years. In a majority of these years, I attended scores of in-house and external trainings in a wide variety of topics. Additionally, for more than ten years, I also served as a subject-matter expert and trained hundreds of mainly commercial bankers in more than one hundred trainings all over the country. To help me acquire the necessary skills, knowledge and aptitude to train other bankers who were also adults, I attended three train the trainer programs in Malaysia, India and Nepal. While I was already a successful trainer before the first of these train the trainer programs, attendance and internalizing the training materials not only helped reify many of my training practices but also opened my horizons to newer ways of designing, delivering and evaluating training programs. To further my training reputation, I also underwent an extended Master-training program which required extensive post-training research and writing a fairly voluminous report and was subsequently accredited to the Chartered Institute of Professional Development (CIPD)<sup>31</sup> in United Kingdom as an Associate Member.

Although I had some minor logistical complaints about the programs, I was a big proponent of the programs and helped numerous other Bankers attend such programs. It is only after coming to my current graduate program and reading theory that I slowly started having suspicion and doubts about the training discourse, in which I was such an enthusiastic foot soldier.

### **The Discourse of Training & Development**

Based on what I have discussed earlier, it can be argued that the field of T&D has become a discourse of the Foucauldian type. Traditional T&D scholarship has allowed certain “aesthetic, moral, and political value judgments” (Bové, 1990. p. 51) to be considered

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<sup>31</sup> CIPD is an organization similar to ATD in the United States.

"commonsensical" and "normal" (p. 53), which in turn have predominantly allowed only certain "self-evident" (p. 53) questions to become possible in T&D. Although the majority of studies in T&D have asked questions that are the result of "particular network of powerful intellectual and disciplinary expectations" (p. 53), they are domesticated to look like natural and innocent and that the knowledge produced by these questions including the knowledge production process is projected as "transparent, naturalized, and self-evident" (p. 52). Bové explained that this occurs because when a discourse is in play, it "draws attention away from itself, from its disciplinary operations and effects-with their promises of reward and assistance-and focuses the attention ... on the need 'to get the job done'" (p. 52).

It can also be argued that sustained arguments for certain models of T&D research and the resulting acceptance of this form of scholarship in Training has led to production of certain forms of truth statements about T&D. Per Foucault, all discourses produce certain truth statements about those discourses which regulate what can be asked, what is asked and how it is asked. Lest one jump to the conclusion that this notion of truth describes "ideas or knowledge that exhibit some inherent accuracy or undeniable empirical correctness" (Brookfield, 2001, p. 15), Foucault (1980c) wrote that *truth* was to

be understood as a system of ordered procedures for the production, regulation, distribution, circulation and operation of statements . . . "truth" is linked in a circular relation with systems of power which produce and sustain it, and to the effects of power which it induces and which extend it. (p. 133)

It is in this context, that my broader interests lie in understanding how the T&D field in the U.S. has come into being in its present form and what has allowed T&D to produce certain truths. While I still believe that train the trainer training programs are a necessity if organizations want

to leverage the subject matter experts' knowledge, I am increasingly suspicious of the supposedly neutral nature of the training discourse. One issue that makes me increasingly uncomfortable is the realization that almost everything that is taught in these train the trainer programs are products of American theorization in fields of adult education, psychology and the military. I was taught almost the same thing by Indian, Chinese and Malaysian instructors in three countries. It would not be a stretch to write that the subject-matter expert cum trainer that is produced in India, Malaysia and Nepal is very similar to the subject-matter expert cum trainer that is produced in the United States. It is with this amazement, that I am thinking with Foucault and being influenced by ideas in his supposedly archaeological phase and am trying to understand what made it possible for certain understandings of trainers and training to emerge in the United States that has been exported to many corners of the world.

### **Archaeology is Not a Methodology<sup>32</sup>**

*"What I've written is never prescriptive either for me or for others – at most it's instrumental and tentative."*

*(Michel Foucault, 2000a, p. 240)*

In his first three books, Foucault was "...attempting to bring to light...the epistemological field, the episteme ... [which will lay bare] ... conditions of possibility"

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<sup>32</sup> *Sous rature*: Based on the earlier use by German philosopher Martin Heidegger, the French philosopher Jacques Derrida used and popularized the concept *sous rature*. *Sous rature* translated as *under erasure* by Gayatri Spivak (1974) in her Translator's preface to Derrida's *Of Grammatology* "is to write a word, cross it out, and then print both word and deletion." (p. xiv). Spivak further clarified that "since the word is inaccurate, it is crossed out. Since it is necessary, it remains legible" (p. xiv). Inspired by the work of Derrida and numerous poststructural feminists who have deconstructed various supposedly critical research terminologies like data, validity, method, I plan to put *methodology* under erasure in my proposed dissertation. Although methodology is an inaccurate term when mobilized in poststructural theorization, it is still necessary to a degree, since there is no other readily accepted terminology in the dominant academic scholarship. Thus, I am following what Spivak stated was the "strategy of using the only available language while not subscribing to its premise" (p. xviii). This section while containing the word *methodology* is not completely prescriptive in what I planned to. Rather it was a general plan that kept me grounded and acted as a contingent foundation (Butler, 1992; St. Pierre & Pillow, 2000) for me to be able to complete this dissertation. Spivak defined deconstruction as "persistent critique of something you cannot not want": an attitude, a way of listening, reading, thinking, and living. "Deconstruction is not a method and cannot be transformed into one" (Derrida, 1992, p. 55).

(Foucault, 1966/1970, p. 344) of certain specific types of knowledge or knowledge about certain topics. He stated that archaeological analysis had allowed him to

rediscover on what basis knowledge and theory became possible; within what space of order knowledge was constituted; on the basis of what historical a priori, and in the element of what positivity, ideas could appear, sciences be established, experience be reflected in philosophies, rationalities be formed, only, perhaps, to dissolve and vanish soon afterwards. (p. 344)

While Foucauldian analytics like archaeology and genealogy as conceived and used by Foucault, are not conventional social science research methodologies, it has not stopped scholars around the world in declaring that they have used Foucauldian methods and methodologies in their work. While there are quite a few scholars who qualify their use of Foucauldian analytics, others have used Foucauldian terminologies similar to how various conventional theoretical concepts and theories are used in traditional research. On account of this, before I discuss my plans for my impending dissertation, I briefly discuss some issues of divergence between qualitative research<sup>33</sup> and *post* inquiries.

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<sup>33</sup> It is difficult to pinpoint the exact instance when Qualitative research came into being but the 1980s is normally considered the period in which it started to become widely read and noted. The theorization in this period was also seen “as an interpretive critique of and alternative to [method-driven] positivist educational research methodologies” (St. Pierre, 2016b, p. 25) that was dominating much of social science research. These early works “(e.g., Denzin, 1989; Erickson, 1986; Lincoln & Guba, 1985) seemed to offer radical possibilities” (p. 25) leading to scholars like St. Pierre mentioning in 1997 that the field was in the cusp to “produce different knowledge and produce knowledge differently” (as cited in St. Pierre, 2016b, p. 26). While qualitative research still retains the original radical intents in various quarters, it has also been domesticated, “overdetermined” (St. Pierre, 2011, p. 611) and “methods driven” (St. Pierre, 2015, p. 77) in academia by what Thomas Kuhn (1970) labeled as the *textbook tradition*. Per Kuhn regular publication of textbooks in a subject/field signifies that the subject/field has become a *normal science*. When textbooks representing the normal science are authored “with assumptions and rules that organize a structure that,

In his lifetime, Foucault repeatedly stated that he did not have prescriptive methodologies that others would be able to replicate. Sheridan (1980/1990) concisely captured what Foucault stated in his lifetime, when he wrote, “there is no ‘Foucault system.’ One cannot be a ‘Foucauldian’ in the way one can be Marxist or Freudian: Marx and Freud left coherent bodies of doctrine (or ‘knowledge’)” (p. 225). However, this does not mean one cannot use the tools that Foucault had used in his own work. He famously stated that at the most he had a toolbox with various tools which could be used differently for different purposes. While he was not prescriptive in any sense, he thankfully wrote a few books and chapters, where he described what he had done in some of his work. For the purpose of writing this dissertation, I am relying on his

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over time, becomes given, self-evident, and normal” (St. Pierre, 2016a, p. 5), it generally produces prescriptive methods of the normal science that allows practices and thinking that prohibits anything but normal science. A large section of qualitative research scholarship also seems to have been subsumed within the Kuhnian normal science phenomena. Since a majority of qualitative research textbooks are written with excessive focus on methodologies, the textbooks obscure that methodology is just “an epistemological project” (St. Pierre, 2018, p. 1) that privileges empiricism which in turn is only “one half of epistemology’s empirical/rational binary” (ibid). Majority of the textbooks focus mainly on epistemology only and not on ontology. Ontology, “the study of what exists and how what exists ... is taken for granted in .... conventional humanist research methodologies ... [with the assumption that researchers] ... know what the world is like” (ibid). Following Descartes’s (in)famous claim and the resultant cogito, the vast majority of researchers seem to have come to the conclusion that “to be is to know” (St. Pierre, 2017, p. 1080). The qualitative researchers schooled from the *normal science* qualitative textbooks are “well trained in ‘how to do’ conventional research methodologies without understanding their empirical and ontological assumptions” (St. Pierre, 2017, p. 1081). Brinkmann (2018) has noted that many qualitative researchers forget/ignore that “philosophical ideas influence everything in the research process from the first formulation of a research theme to the final reporting of the results” (Brinkmann, 2018, p. vii) and that “one’s basic philosophical orientation will often affect which research questions one becomes interested in to begin with” (p. 161). Brinkmann also noted that qualitative researchers must be acutely mindful that “all research questions are infused with philosophical presuppositions and implications” (Brinkmann, 2018, p. 163) and that “philosophical ideas influence everything in the research process from the first formulation of a research theme to the final reporting of the results” (Brinkmann, 2018, p. vii).

book *Archaeology of Knowledge* and some key secondary books authored by scholars like Gary Gutting (1989) who are considered as the primary interlocutors of Foucault.

Before I proceed to discuss my plan in this proposed dissertation, I would like to restate the need to be careful of using and following ~~methods and methodologies~~ in poststructural work. While Beardsworth (1996) wrote the following about Derrida, it is equally true in the work when any of poststructural theorists is mobilized to think and do inquiry:

Derrida is careful to avoid this term [method] because it carries connotations of a procedural form of judgment. A thinker with a method has already decided *how* to proceed, is unable to give him or herself up to the matter of thought in hand, is a functionary of the criteria which structure his or her conceptual gestures. (p. 4)

Due to Foucault not explicitly mentioning the step-by-step guide and various secondary authors interpreting Foucault in their own ways, a Foucauldian template to inquiry does not exist and research that claims to be using Foucauldian archaeology or being influenced by Foucauldian archaeology differ quite a bit (Tisdale, 2003). Scholars (e.g., Gutting, 1989; O'Farrell, 2005) however do agree that an archaeological inquiry will require identification of statements<sup>34</sup>; inquiry on relationship between various statements; ascertaining which statements are being repeated and understanding what makes it possible for the statements to be repeatable;

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<sup>34</sup> Statements form the basic unit of analysis in archaeological enquiry because they make objects, subject positions, strategies and tactics visible, and consequently they become amenable to analysis. At the same time, in exploring these statements, we learn something about the ways in which they are made visible in the first place; the matrices of power relations that make certain forms of knowledge authoritative (and thereby acceptably expressed as statements), and other forms unacceptable (and thereby suppressed). The rules that govern the visibility of statements, and their subsequent effect on the formation, correlation and transformation of discourses, were set down by Foucault as guiding principles for understanding the interplay between statements and discourses, and they, therefore, provide a useful vehicle with which to approach the analysis of texts.

ascertaining what subject positions<sup>35</sup> are being created by the statements; ascertaining if discontinuities exist between statements; ascertaining the internal contradictions and differences existing within the statements; ascertaining and describing the surfaces of emergence—places within which objects are designated and acted upon; describing institutions which acquire authority and provide limits within which discursive objects may act or exist; and describing 'forms of specification', which refer to the ways in which discursive objects are targeted. Scholars also mention that these are broad guidance provided by Foucault and it may not be possible to engage with all of the above in a study. Scholars have also pointed out that although Foucault (1969/1972) described these *steps* in his book *Archaeology of Knowledge*, all of the *steps* are not easily visible/described in all of his archaeologies that he had previously authored (Gutting, 1989; O'Farrell, 2005).

### **Common, Normal and Commonsensical**

A commonality among those who have engaged with archaeology in their scholarship is their concern to understand something that appears common, normal and commonsensical in the present. For example, Tisdale (2003) was interested in *emotional disturbance*, a concept widely accepted across various disciplines. Bourke's (2011) interests lay in understanding how across the world there is wide acceptance of the view that to enhance professionalism in a profession, professional standards are needed. Robbins (1999) was interested in attention deficit disorder (ADD), again another concept which has wide acceptance. Similar to Tisdale, Bourke and Robbins, my research interest is in a common, normal and commonsensical terminology in

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<sup>35</sup> Foucault also explored how discourses made certain subject positions possible by asking questions like who is speaking; whose authority carries legitimacy; who is allowed to provide commentary on particular objects? Subject positions in turn enable discursive objects to emerge.

everyday organizational life—training. As discussed earlier in Chapter 1 and Chapter 2, training and development has become a ubiquitous concept and practice in all varieties of organizations: government, non-government, private, public, school, universities, non-profit.

Researchers like the ones mentioned above are interested in concepts that appear *real* and which have “real effects in the world” (Tisdale, 2003, p. 1) and are talked about in a manner that shows them as “natural, history-free reality rather than as “merely” a historical construction” (Tisdale, 2003, p. 2). Researchers engaged in archaeological work contest the seemingly ahistorical existence of various concepts and are thus engaged in research that will contend that concepts are productions of specific discourses. These researchers are not interested in whether a concept “*should* exist or whether it should exist in a particular way” (Tisdale, 2003, p. 4), rather the researchers are interested in how these concepts have come alive, have come to exist and have been thought of as real objects of knowledge that can be “studied, compared, understood, discussed, and legislated” (Tisdale, 2003, p. 4) with their own sets of journals, textbooks, associations, standards and practices. These researchers are also not interested in rejecting or destroying the concept under study or rejecting the traditional history associated with these concepts. Rather, the aim of these researchers is to open up a space so that the concepts “can be thought, articulated, and done differently” (Tisdale, 2003, p. 4). Towards this end, researchers engaged in Foucauldian archaeology are interested in the conditions of existence for the formation of certain concepts<sup>36</sup>. This requires a two-pronged approach. The first relates to

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<sup>36</sup> Foucault also considered the formation of concepts and strategies. Concepts and strategies group statements around particular notions of practice which, in turn, situate people in relation to the objects that these statements construct. Taken together subjects, objects, concepts and strategies form a set of guiding principles that focus on what can be said, or thought, and what cannot.



obtaining an in-depth understanding of the concept in question including understanding of the various conceptual and theoretical models that are used in the field of study i.e., being acutely aware of the conventional history of the concept<sup>37</sup>. The second is identifying archive(s) where the evolution of the concept will be queried upon and thereafter engaging in the archaeological investigation. To engage with each of these approaches, Foucauldian analysis requires a persistent engagement with documents.

## **Documents**

Majority of research in the social science, either qualitative or quantitative, is generally “predicated on the presence of ... a knowing subject” (Prior, 2004, p. 317). Depending on the research methodology, the knowing subject(s) might be observed, questioned in interviews or asked to complete surveys to reveal some conscious aspect of persona/social life and/or personal/social behavior. Prior has stated that “this dependence of the social sciences on the knowing subject, however, has itself been consistently questioned during the final decades of the twentieth century” (p. 318).

One concern has been the dominance of research practices where the spoken work is privileged as the primary *data* in contrast to documentary data. Prior noted that one reason for this possibly could be on account of qualitative research’s anthropological history where the bulk of research occurred in communities with low literacy levels where documents could have played minor roles. Another possible reason could be what Derrida has argued is the privileging of the spoken over the written in Western metaphysics.

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<sup>37</sup> Chapter two of this dissertation contains the conventional understanding of training, trainer and other related artifacts and has been presented in a traditional literature review format.

Another key concern has been how the interviews and surveys normally fail to take into account the different social relations that is outside the “consciousness of the isolated subject ... [in other words] look at something that lies beyond the world of the atomistic individuals” (p. 318). Foucault (1966/1970) in his oeuvre was concerned with this *something* beyond the thinking subject; he claimed that his analyses were based “not [on] a theory of the knowing subject, but rather [on] a theory of discursive practice” (p. xiv). Thus, Foucault rejected

the *author* as the source and origin of textual knowledge<sup>38</sup>, whilst in place of authorial intent and design, Foucault attempted to examine the discursive rules through which knowledge comes to be produced, encoded and displayed. For, according to him, it is only by means of such rules that any ‘author’ can claim a legitimacy to speak, write and authoritatively pronounce on a given topic in the first instance. (Prior, 2004, p. 319)

Gutting (2005) noted that “Foucault’s famous ‘marginalization of the subject’” (p. 33) is predicated on Foucault’s idea that every mode of thinking involves implicit rules that are outside of the control of the individual and constrain the individual who actually does the thinking in a given period. However, it needs to be noted that while Foucault did not deny “the reality or even the supreme ethical importance of the individual consciousness [he also argued that] individuals operate in a conceptual environment that determines and limits [individuals] in ways of which

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<sup>38</sup> In French, knowledge is understood as two different concepts: *savoir* and *connaissance*. Understanding knowledge as *savoir* and *connaissance* is critical in understanding archaeology. *Savoir* includes formal knowledge such as philosophical ideas and everyday opinions but also institutions, commercial practices, and police activity whereas *connaissance* include only formal bodies of knowledge such as scientific books, philosophical theories, and religious justifications. Gutting (1989) opined, “By *connaissance* he [Foucault] means ... any particular body of knowledge such as nuclear physics, evolutionary biology, or Freudian psychoanalysis” (p. 251). In contrast, *savoir* “refers to the [broad] discursive conditions that are necessary for the development of *connaissance*” (p. 251). Per Foucault *savoir* is a certain special implicit knowledge in societies that makes possible at a given moment the appearance of a theory, an opinion, a practice.

they cannot be aware” (p. 33). Based on these Foucauldian understandings, documents are increasingly seen as “a site or field of research in itself” (Prior, 2003, p. x).

### **Documents Reviewed**

Since Foucauldian archaeology is an analysis of documentary data, I focused on the documentary repositories of the publications of the Association of Talent Development.

As noted earlier in Chapter 2, Association of Talent Development is the preeminent training association in the world and from the 1940s has served as the home of training professionals in the United States. The association from nearly its inception has been publishing a wide variety of literature on the training field: journals from 1945; training and development handbook from 1967 and competency standards from 1978. I focused on the practitioner literature from ATD from its inception till 2015 because ATD’s last train the trainer manual was published in 2015 and the last competency standard was published in 2013<sup>39</sup>.

### **Strategies Employed**

Foucauldian historiographical analyses are not hermeneutic in the traditional sense. Gutting (2005) has noted that an archeologist is not trying to *interpret* what we hear and read in order to recover its deeper meaning...Archaeologists of knowledge, in other words, do not ask what Descartes’ *Meditations* mean (that is, what ideas Descartes was trying to express in them). Rather, they use what Descartes – and many other writers, famous or not, of the same period – wrote as clues to the general structure of the system in which they thought and wrote. (p. 34)

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<sup>39</sup> After the name change, ATD has published a publication titled *Talent Development Capability Model* in 2019. I have not reviewed the document, since TTT documents have not been prepared based on this document.

## **Data Collection Plan**

The original plan for collecting the ~~data~~ included visiting the National and ASTD archives in person and accessing ASTD publications through UGA's library. However, with the onset of Covid-19, I could not visit both of the archives in person. I, therefore, restricted my search of documents to searchable through UGA, materials available in online websites like ERIC and Archive.org, and online bookselling websites.

## **Data Collection Process**

UGA's library does not have complete access to ASTD's online database. ASTD's journal articles from 1965 onwards are available through the UGA's online search engine; most articles are not available in PDF readable format. Articles before 1965 are available either in UGA or in Georgia Tech in hardcopy form. Since I could not visit the library because of health reasons to scan the hard-bound documents and the PDF copies were not readable, I became a paid ASTD member to access their digital archive, which contains digitalized articles published in their journal from 1945. The paid membership also allowed me to access numerous issues of a publication known as *INFO-LINE* (currently known as *TD at work*), a review of which constitutes a portion of my ~~data~~ analysis.

## **Data Screening Process**

After I obtained access to ASTD's online database, I started the search of articles with search terms like "train the trainer," "trainer," "subject matter expert," "non-professional trainer," "training trainers," etc. These terms were identified based on the previously conducted literature review. In later stages, I expanded the search using terms like "Malcolm Knowles," "Donald Kirkpatrick," "competency," "evaluation," "andragogy," "*INFO-LINE*," etc. I searched terms like these because they appeared in the documents that I searched previously. In the third

stage, I searched for competency studies, and other documents published by ASTD that were referenced in the documents searched earlier. Since books and other ASTD publications were not available in ASTD's online database, I requested the books through UGA's library after it became safe to visit the library and bought other books that were not available in the library. I recorded the details of files that I was downloading and reading in MS Excel.

### **Data Review and Data Analysis Process**

In his book *Archaeology of Knowledge*, Foucault (1969/1972) has discussed some of his strategies when conducting his archaeologies. Using ideas gleaned from that book, I wrote a few questions (listed below) that helped analyze and ultimately write the findings and discussion chapter. During my initial review of the ASTD documents, I started noticing a few statements like there are *systematic ways of training trainers, there are certain skill sets that SMEs need to master to become successful trainers, to be a successful trainer, trainers must know adult learning theory, be able to deliver training, and evaluate training, etc.* Mobilizing Foucauldian thinking, the questions then become why these statements were showing up regularly and why the T&D field (as manifested in ASTD journals) had become what Foucault referred to as a relatively stable "discursive formation." To understand why statements like these were appearing, I sought to spell out the *rules of formation*, i.e., the conditions under which statements have achieved regularity.

In *Archaeology of Knowledge*, Foucault had discussed his detailed classification of four rules governing the discursive formation:

- rules for the formation of objects (the objects its statements are about), which are themselves of three sorts (surfaces of emergence, authorities of delimitation, and grids of specification).

- rules for the formation of concepts that establish various attitudes of acceptance or rejection toward classes of statements; the kinds of cognitive status and authority they have (what Foucault rereferred to as enunciative modality). Such rules define, first, a field of presence, then a field of concomitance, and a field of memory.
- formation of concepts is governed by rules specifying various procedures of intervention that may be applied to a discursive formation's statements to produce new statements; the concepts in terms of which they are formulated. The rules include forms of succession (rules that establish relations), forms of co-existence, and procedures of intervention.
- the fourth and last type of rule governing the statements of a discursive formation concerns the formation of strategies. By a strategy, Foucault means a specific theory (or theme) that develops within a discursive formation (e.g., a theory of evolution in biology, the idea of an original language from which all others derive in philology); the themes (theoretical viewpoints) they develop.

I would like to restate an important point before I proceed further. Foucault had published these rules in his fourth book, after having written three books that are classified as archaeologies. Scholars have also pointed out that although Foucault described these *steps* in his book *Archaeology of Knowledge*, all of the *steps* are not easily visible/described in all of his archaeologies that he had previously authored (Gutting, 1989; O'Farrell, 2005). Further, scholars have also noted that in his earlier archaeologies, all of these rules are not explicitly described. Questions that I developed from the above rules are as follows:

- Surfaces of emergence: What social locations like the family are the places where objects of the discursive formation of training & development emerge?

- Authorities of delimitation: What are the authorities of delimitation (i.e., institutions which possess the authority) to speak about the various objects in T&D?
- Grids of specification: In what ways have the objects been classified, organized, divided, and regrouped in T&D?
- Formation of enunciative modalities, i.e., under what conditions have the various statements about the different training objects been enunciated and examined
  - Who has been speaking or has been allowed to speak about the training objects?
  - In what institutions or settings is it proper to be spoken?
  - What is the speaker's relation to the object he or she is speaking about?
- Forms of succession and dependence how are the training statements combined into a single discourse
  - field of presence: what are the statements that are taken up from elsewhere but are an accepted part of T&D?
  - field of concomitance: what are the statements from other discourses that are used analogically, as models, or in some legitimizing function in T&D?
  - field of memory: what are the statements that are no longer part of a field of presence but to which significant relations continue to exist?

These questions were used to analyze the publications and write the findings chapter.

Keeping the above into consideration, in my dissertation I used the above strategies to query on the following two research questions:

1. In what ways has the train the trainer (TTT) concept been articulated in the ASTD literature?
2. What conditions of existence have made these articulations possible?

Since Foucault sought to “describe discourses in the conditions of their emergence and transformation rather than in their deeper, hidden meaning, their propositional or logical content, or their expression of an individual or collective psychology” (Sparknotes, n.d.), I focused only on surface level of the documents. The focus was to identify and describe the various "systems of rules, and their transformations, which make different kinds of statements [relating to subject matter expert and train the trainer] possible" (Davidson, 1986, p. 222).

### Summary

In this chapter, I have discussed the theoretical and ~~methodological~~ concepts of archaeology – one of Foucault’s historiographical analytical tools – by situating archaeology within Foucault’s larger scholarship. I also discussed the steps I took to collect and analyze the ~~data~~ by formulating some guiding question based on Foucault’s *Archaeology of Knowledge*.



## CHAPTER 4

### WHAT IS SAYABLE ABOUT THE TRAIN THE TRAINER?

*Words are always thinkable, sayable, and writeable...only in particular grids of intelligibility, usually dominant, normalized discursive formations.*  
(St. Pierre, 2011, p. 621)

In this chapter, I address the first research question: *In what ways has the train the trainer (TTT) concept been articulated in the ASTD literature?* I present and discuss my findings in three separate but interrelated sections. In the first section, I discuss what has been articulated about training trainers in ASTD. In the second section, I further the discussion by focusing on a key ASTD publication – *INFO-LINE* – that has been the key publication used to train subject matter experts. Finally, in the third section, I discuss how certain concepts like andragogy have become foundational in ASTD publications concerned with training trainers.

~~Methodological~~ note: Foucault (1969/1972) noted that in archaeology, the analysis of statements operates ... without reference to a cogito. It does not pose the question of the speaking subject, who reveals or who conceals himself in what he says, who, in speaking, exercises his sovereign freedom, or who, without realizing it, subjects himself to constraints of which he is only dimly aware. In fact, it is situated at the level of the ‘it is said’.... (p. 122)

Since I am not interested (given the scope of this dissertation) in exploring the meanings behind what the authors have written in ASTD, I generally do not expand what the author might have meant or not in their articles. Thus, I am not discussing whether or not Lippit et al. (1964) should or should not have conducted their study or whether their study design was robust or not. An

extensive demonstration of what this means will follow later in the chapter when I discuss the work of Malcolm Knowles. I note that Knowles's ideas have been critiqued extensively; however, I will not *dig deep* into those criticisms to see the validity of those criticisms. Nor will I delve into whether or not Knowles can be truly labeled a humanist thinker as many have argued he was. Given that this dissertation aims to explore how certain articulations become possible, my focus thus is on exploring how particular objects are discursively produced and what structures enable those productions.

### Section 1: Articulations

In this first section, I discuss what has been articulated about training trainers in various ASTD publications. However, before proceeding any further, I present an excerpt from a 1951 article published in the *Journal of Training Directors*, as the journal of ASTD was known at that time. The excerpt is from an article authored by Herman J. Gemuenden, President of the American Society of Training Directors, and published in 1951 in the *Journal of Training Directors*.

My assignment is to present the views of professional training directors on the subject, "Training Instructors for Industry." In preparation for this presentation, a questionnaire was sent to 100 industrial training directors selected to secure a cross section of small to large operations in a variety of industries in all parts of the country. As was anticipated, the questionnaire established a positive and near urgent need for training instructors for industry, so the next logical question is,

"From what sources does industry recruit personnel for training as instructors?" Put together, the answers read like this:

1. From the shops, laboratories, offices, and the line and staff organizations within the plant or company.
2. From other companies and other industries, by gentlemanly pirating.
3. From schools and colleges.

Those trainers who analyzed the situation more thoroughly explained that common practice is to select trainers from within the plant organization for teaching the manual skills and specific job knowledge required in the operating routine peculiar to the company. It was pointed out that this type of trainer or instructor is not hard to find. Any well-run plant, shop or office has

among its operators people who are natural trainers —people who, with a little coaching and grooming, are quickly equipped to function as trainers.

Our questionnaire next asked, "What type of training must be given to potential instructors in industry?" Answers indicate two general needs in instructor training. First, the person with a background of industrial or business experience must be given teacher training; and second, the person possessed of teaching experience must be trained in industrial procedures.

The opinion of training directors today is that, assuming the potential trainer knows the job for which he is to be a trainer, he must be given, in addition, a complete understanding of the learning process and those factors that aid or retard it; he must be made fully appreciative of individual differences, attitudes, interests, motivation, plateaus, and other factors that bear upon learning and teaching.

The article containing the above excerpt was a reprint of a paper given by ASTD to an American Vocational Association meeting in 1951 and discussed issues like subject matter experts training others, the need to train SME in training/teaching practices, and the need for a trainer to be taught specific topics. The issues raised by Gemuenden in 1951 have remained a key concern in the ASTD publications over the decades. While many of the items have remained the same, other conversations have evolved in ASTD publications in the last 76 years. Thus, to concisely and succinctly present how SME and TTT concepts have been articulated in various ASTD publications, I have broadly classified the 76 years into two periods:

1. The formative years (pre-competency years): This period covers the period between the 1940s to the mid-1970s.
2. The competency years: The period after the mid-1970s to the present.

During the mid-1970s, ASTD formally started to conduct a competency study that ultimately was published in 1978. Multiple other competency studies have since followed that first competency study in 1983, 1989, 1996, 1998, 2004, 2013, and 2019. The arguments made in and around the competency studies have impacted how assertions are made about trainers and how training to train the trainer is conceptualized and executed.

Following the steps outlined in Chapter 3, for each period, in the sections below, I present a summary of what was published that relates to my research question, who was making those claims, what was being repeated, which authors were being repeated, what was not being discussed, and what was being ignored.

### **The Formative Years (the 1940s to the Mid-1970s)**

Analysis of the ASTD publications published since ASTD's inception to the mid-1970s shows that the discussions about trainers and the need to train the trainers have occurred within the broader discussion on training personnel and training design which I elaborate on below.

#### ***Training Personnel***

***Training director.*** A key object under considerable discussion in ASTD publications in the early years was the *training director*. While a commonly accepted definition of training director does not exist in the ASTD literature, the role has usually referred to a staff<sup>40</sup> member with the administrative responsibility of managing the training function. For example, Nadler<sup>41</sup> (1962) defined a training director as the "person whose major job assignment is in the area of employee education. He may have other functions, but he will have been assigned the responsibility for the administration of the training program for his unit" (p. 2). In addition to this narrow understanding, the training director was also described as someone with multiple roles: learning specialist and instructor, administrator of the training staff and programs, and

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<sup>40</sup> Historically the term *staff* has been used to refer to employees in support functions like Accounts, Procurement, Personnel, Training etc. in contrast to the term *line*. Line employees are those directly employed in the core business of the organization like sales, manufacturing, etc.

<sup>41</sup> Leonard Nadler, PhD – Professor of Adult Education and Human Resource Development, School of Education, The George Washington University, Washington, DC.

organizational problem solver (Lippitt<sup>42</sup> & Nadler, 1967). Since ASTD came into existence in 1943 when fifteen training directors came together to form the association, *training directors* existed during WWII. While the ASTD literature does not shed light on whether the position came into existence during WWII or had existed before WWII, the ASTD literature provides evidence of extensive discussion on training directors after WWII. The post-WWII economic boom led to organizations needing sophisticated management and personnel skills compared to what was required before WWII (Allhiser, 1970<sup>43</sup>). Thus, the extended discussions around *training directors* can be understood against the background of increased and changing demands on the training function and the training directors.

A review of ASTD's publications demonstrates that considerable discussion revolved around concerns of qualifications and the development of the training directors. For example, while Gossage (1968) discussed the qualification and educational needs of training directors, Goulette<sup>44</sup> (1960) addressed the need for adult education for the training director, and Nadler (1966) focused on the need to prepare the training directors professionally. Further, authors like Root<sup>45</sup> and Roberts<sup>46</sup> (1966) discussed competencies required by training directors. In addition to articles that can be viewed as opinion pieces, authors also reported study findings that can

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<sup>42</sup> Gordon L. Lippitt, PhD – Professor, School of Government and Business Administration at The George Washington University. President – ASTD.

<sup>43</sup> Norman Allhiser – Professor, University of Wisconsin, Management Institute Commerce Extension, Madison, WI.

<sup>44</sup> George J. Goulette – Director of academic training for Hawthorne Aviation.

<sup>45</sup> Blake S. Root, PhD – Professor of Education, The George Washington University. Previously training officer in the War Production Board and Head of the Professional and Technical Training Section, Office of Price administration. Served as Director, Washington, D. C. Chapter of ASTD, and Chairman, Research Committee.

<sup>46</sup> R. Ray Roberts, PhD – School Relations Assistant, Bureau of Naval Personnel, Washington, D. C. Previously Editor of the "Naval Training Bulletin" and Educational Specialist, U.S. Navy Training Publications Center.

possibly be considered watered-down versions of empirical studies by today's standards. For example, Lippitt<sup>47</sup> et al<sup>48</sup> (1964) focused on the attitudes of training directors toward the application of research to the training program, Gemuenden (1951) studied dimensions of training instructors, and ASTD itself reported a study that queried on training directors to understand what research was needed in industrial training. The discussions on the training directors were carried out by practitioners (e.g., Thomas, 1960<sup>49</sup>), academics (e.g., Lippitt & Nadler, 1967), and ASTD officer bearers (e.g., Christensen, 1953<sup>50</sup>). The involvement of practitioners in the discussion is not surprising since *training directors* had historically come from inside of the organization itself (Allhiser, 1970).

**Trainers.** In addition to the training director, objects like the *trainer*, *professional trainer*, and *non-professional trainer*,<sup>51</sup> were also areas of concern in the ASTD journal. Articles on these objects followed a similar pattern to articles that focused on the training directors: some focused on describing different aspects of trainers. In contrast, other articles focused on trainer development. For example, a set of articles focused on discussing the responsibilities of a trainer (e.g., Hunt<sup>52</sup>, 1963), challenges faced by professional trainers (e.g., Hartmann<sup>53</sup>, 1958), and what

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<sup>47</sup> Shirley D. McCune, PhD – Research Scientist at the Center for the Behavioral Sciences at The George Washington University.

<sup>48</sup> Larry D. Church – Research Assistant Center for the Behavioral Sciences at The George Washington University.

<sup>49</sup> Karl M. Thomas – Personnel Training Coordinator, International Minerals & Chemical Corp. Skokie, Ill.

<sup>50</sup> W. C. Christensen – President, ASTD.

<sup>51</sup> Although the phrase *subject matter expert* was infrequently used in the early decades of ASTD, I am using the term to ensure a commonality in usage of the term across the dissertation. Phrases like *nonprofessional trainer*, *line instructor*, *technical instructor*, *industrial trainer* etc. were used by different authors to refer to what we currently understand as a subject matter expert.

<sup>52</sup> William H. Hunt – Employee development officer (Training officer) at the U.S. Army Columbus General Depot.

<sup>53</sup> Ralph M. Hartmann – President, ASTD.

trainers could not forget (e.g., Goodell<sup>54</sup>, 1969). Articles like these were used to discuss the desired characteristics and behavior amongst trainers implicitly. Although the articles do not immediately appear to be related, a large portion of the articles focused on trainers' skills, competencies, and knowledge required to be successful trainers. Examples include Nadler (1955) focusing on developing non-professional trainers, Bescoby's<sup>55</sup> (1958) arguments for the need for trainers to develop, and exploration of how University executive programs could be used to develop trainers (Blansfield<sup>56</sup>, 1958). It should be noted that the focus on developing trainers is not dissimilar to the focus around the discussion on developing training directors. Another set of articles that highlight the importance of trainers and subject matter experts (e.g., Blake's (1966) discussion on the reasons for using SMEs; De Santo's (1965) arguments on how trainers are essential) are implicitly used to argue for the need to train trainers. Authors similar to Gemuenden (ASTD President), cited at the start of this section, like Bell (1953), Neagle (1963), Porter (1967), Starrfield (1957), and Ward (1960) also discussed different aspects of training the trainer.

As evidenced in the excerpt at the start of this section, authors like the President of ASTD, who have had distinguished careers and long-lasting impact on the field, discussed various facets of SME and the need to train trainers from ASTD's early days. For example, in

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<sup>54</sup> Francis C. Goodell – Research Associate, Educational research council of America, OH.

<sup>55</sup> Isabel Bescoby – District Staff Training Representative for the Government of Canada, Civil Service Commission.

<sup>56</sup> Michael G. Blansfield – Training Director of the Air Force's San Bernardino Air Material Area. Formerly an industrial personnel consultant.

1955, Leonard Nadler (1955)<sup>57</sup> discussed why and how non-professional trainers could be mobilized in training setups. He noted:

Selecting the non-professional trainer is important, but unfortunately it is difficult to shed much light on the subject. There is no research to quote and few experiences have been recorded in our professional journals. A quick survey of programs of meetings, institutes, and similar professional gatherings has not shown any speakers or workshops on "Developing Non-Professional Trainers." The following comments then are based on the writer's use of this technique in the Information and Education activity during the war and experiences in his present position. (pp. 24-25)

Nadler succinctly captured how the scholars in the 1940-1960s period recognized the need to use SMEs in training, challenges in training the trainers, and absence of any accepted manner of training trainers, and ideas on how to train trainers were based on the first-hand experience of the authors themselves.

### ***Training Design***

I am now discussing another set of articles directly related to my research questions under the *training design* sub-topic. Numerous articles focused on issues that can possibly be classified as being concerned with training design (e.g., Morrison, 1953; Swank, 1964; Winston, 1968). However, concepts like Instructional Systems Design, a mainstay of current training programs, are not discussed during this period. A cornerstone of modern training worldwide – Kirkpatrick's

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<sup>57</sup> Although Nadler was already writing in ASTD journals in the 1950s, he only completed his doctorate in 1962 from Columbia University by writing a dissertation titled "*A study of the needs of selected training directors in Pennsylvania which might be met by professional education institutions.*" While he went on to a celebrated academic career and subsequently used his academic credentials in making various arguments, this article is based on his "use of this technique in the Information and Education activity during the war [WWII] and experiences in his present position" as Senior Training Technician with the New York State Department of Civil Service.



four-level evaluation model – was introduced to ASTD readers during what I have labeled as *the formative years*. During 1959 and 1960, Donald L. Kirkpatrick<sup>58</sup> was invited and subsequently published four articles in ASTD,<sup>59</sup> where he sequentially discussed each of his four levels of evaluation. While Kirkpatrick's work is not referenced frequently in this first period, his growing reputation in ASTD in the 1960s is evidenced by his publication of a chapter titled *Evaluation of training* in ASTD's first handbook in 1967.

Although some scholars were still making arguments for why training was needed even in the 1960s (e.g., Harger, 1961), other authors, even as early as 1948, were noting that industrial training had played an essential role in American industry and "the era of debate regarding training methods has passed" (McGehee, 1948, p. 6). Despite McGehee's assertion, both arguments for and against different training methods and explanations of other training methods have continued almost through the 78 years of ASTD's existence. For example, articles focusing on role-plays (e.g., Laird & Hayes, 1963), programmed instruction (e.g., ASTD, 1963), and case studies (e.g., Boyd, 1964) were published during the 1960s. This trend was also reflected when ASTD published its first handbook in 1967. Of the 32 chapters, six were concerned with training methods.

### **The Competency Years (the Mid-1970s to the Present)**

This second period which I have labeled as the *competency years* covers the years after the mid-1970s. In addition to the continuation of earlier concerns and areas of focus, this period

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<sup>58</sup> Donald L. Kirkpatrick, PhD – Assistant Director, The Management Institute, The University of Wisconsin. In later years, he would become Professor, University of Wisconsin. President – ASTD. Previously Training Director for International Minerals and Chemical Corp. and Human Resources Manager of Bendix Products Aerospace Division.

<sup>59</sup> Kirkpatrick was the first author in ASTD's history to publish his ideas in a sequential manner in four different issues.

also saw the introduction and a quick solidification of concepts like *andragogy*, *instructional systems design*, and *competency models* in the ASTD literature. Concepts like the four-level evaluation model introduced in the earlier period also gained extensive traction in the field. This period also witnessed the introduction of the term *human resource development* (HRD) in the ASTD vernacular. While discussions around HRD gained prominence over the next two decades, ASTD's publication saw a decline of scholarship explicitly focusing on HRD in the latter half of the 1990s<sup>60</sup>.

In 1991 ASTD decided to convert their flagship publication, which up to that point in time was known as a *journal*, to a magazine:

As the HRD field and your needs have evolved, we've made a gradual shift from theoretical, "journal" content and presentation to a more practical, "magazine" approach.

The new name, Training & Development, makes that shift official. (ASTD, 1991, p. 4)

Further, starting around the 1990s, ASTD's focus on performance became more pronounced. While ASTD had conversed about performance in the earlier period also (as seen in programs like *The challenge to trainers - Promoting change in human behavior for profit improvement* organized by the ASTD's annual institute in 1961), during this period, ASTD made it explicit that it was making performance its focus (Galagan, 1996).

This period also witnessed the extension of discussion on the need to professionalize the training field initiated in the previous period. As far back as 1960, Lippitt had authored an article titled *Is training a profession?* He concluded the paper by declaring that training was not yet a profession. However, he also noted the criteria needed for a profession and what needed to be done for ASTD to be considered a profession, including an extensive discussion of the

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<sup>60</sup> A detailed discussion on this phenomenon will follow in Chapter 5.

characteristics a trainer needed to possess. While this article was not the first to discuss professional standards and competency, the article set the stage for an extended conversation on competency in the second period that I have labeled as the *competency years*.

ASTD published numerous competency studies in the years 1978, 1983, 1989, 1996, 1999, 2004, 2013, and 2019. The competency studies also fueled an explosion of publications that discussed, elaborated, and critiqued claims in the competency models. Corollary to the findings of the various competencies studies that identified skills, knowledge, and attitudes required of different training personnel, ASTD publications subsequently witnessed a substantial increase of articles on different aspects of training function and trainers. While articles in the earlier period had also focused on various facets of the training function and trainers, ASTD publications relating to training were increasingly clustered around sub-groups like training design, training methods, training needs analysis, training evaluation, and training the trainers in addition to focused attention on trainers and SMEs. Some sample articles from each of these sub-groups are listed below, along with brief details of the authors of the articles:

**Table 9***Articles Discussing Different Aspects of Trainers*

Year	Title of article	Author(s)	Author(s) details
1970	Trainer behavior in T-groups	Cary L. Cooper Iain L. Mangham	Lecturer in Social Psychology, University of Southampton, England. Lecturer in Management, University of Leeds, England.
1970	Which role for today's trainer	Julius E. Eittington	Chief Training Officer, National Park Service, U.S. Department of the Interior, Washington, D. C.
1976	Separating the amateurs from the pros in training	Malcolm Knowles, PhD	Doctoral student in human resource development at George Washington University. Director of management development and training at NCNB Corp., a one-bank holding company based in Charlotte, N.C. Staff of the Instructional Methods Division of the U.S. Army Infantry School. Immediate past president of the Carolina-Metrolina chapter of ASTD.
1976	The trainer as Machiavelli	Chip Bell	HRD Consultant.
1980	How can intuition help trainers	Anne D. Robinson	Vice president of sales and marketing for The Industrial Training Group, PA.
1980	Trainer credibility: A sure way to lose it	Jerome J. Peloquin	
1982	Advice to trainers-Keep one eye on the classroom and one on the job	Donald K. Kirkpatrick, PhD	
1982	New trainers gaining self-confidence and respect	Elizabeth S. Gorovitz	Assistant Editor, ASTD.
1983	What concerns today's trainers	Louis Olivas, PhD	Assistant Professor, Administrative-services at Arizona State University and Director of the Center for Executive development in the College of Business. Colonel-Arizona Air National Guard.
1983	Why trainers still must be able to talk	Tom Inman Randi Sigmund Smith	Professor, Business administration, Arizona State University President, Smith and Associates, Inc., a consulting firm in CT.
1984		Dugan Laird	Internationally recognized training and development consultant.

Year	Title of article	Author(s)	Author(s) details
	How master trainers get that way	Forrest Belcher	Consultant - MEGA Consultants, Inc. President – ASTD. Director of training and development for Standard Oil Company of Indiana. Founder and chairman of The Whitney Group, a think tank for experienced HRD practitioners.
1985	10 techniques for drawing out trainers	Jerry W. Gilley, EdD	School of occupational and adult education, Oklahoma State University. Subsequently served as AHRD president. Professor in multiple universities. Principal (Vice President) responsible for the Organization and Professional Development (ODPD) Department at Mercer Human Resource Consulting, the world's largest compensation, benefits, and human resource consulting firm.
1987	Advice to a rookie trainer	Steven K. Ellson	Manager of educational services at Memorial Hospital, South Bend, Indiana.
1992	The trainer as storyteller	Chip Bell, PhD	Partner with Performance Research Associates in Charlotte, North Carolina.

As shown in Table 9, various groups of speakers like academics (e.g., Olivas, 1985), practitioners (e.g., Ellson, 1987), and ASTD office-bearers with academic background (e.g., Gilley, 1985) have *spoken* on different aspects of training.

**Table 10**

*Examples of Articles Discussing Different Aspects of SMEs*

Year	Title of article	Author(s)	Author(s) details
1975	Finding the trainers among you	Charles E. Kozoll	Associate Director - Continuing Education and Public Service, University of Illinois. Also serves as a Consultant of Management Training and Executive Secretary Development Programs for the Federal government
1977	Why not use your line managers as management trainers	Theodore H. Curry II	Faculty, Graduate School of Labor and Industrial Relations, Michigan State University. Held line management positions in telephone and banking industries previously and worked at Procter & Gamble and Bishop College.
1979	Confessions of a new sales trainer	Beth Jones	Sales Training Officer, NCNB Corp. Also served at Vail Associates previously.

Year	Title of article	Author(s)	Author(s) details
1982	Technical trainers are incompetent!	Jerome Peloquin	President - Performance Control Corp.
		Terri Kobel	Coordinator - Allied Health Education, Education Department, Carle Clinic Association.
1985	Proof-You're a trainer!	Alice Faron	Coordinator - Continuing Education, Department of Education and Training, Carle Foundation Hospital.
1986	When managers do the Training	Paul Chaddock	Senior Vice President for Personnel, Lechmere Inc.
1988	Performance testing for technical trainers	Richard L. Sullivan	Associate Professor, Administration, Vocational, Adult and Higher Education Department, Central State University
1989	The non-professional trainer	Judith Cannan	Chief, Processing Services, Library of Congress

In addition to groups discussed in Table 9, authors (e.g., Curry, 1977), listed in Table 10, have used their first-hand experience in industries and academic credentials to make claims on various training objects like subject matter experts.

**Table 11**

*Examples of Articles Discussing Different Aspects of Training Trainers*

Year	Title of article	Author(s)	Author(s) details
1975	Training of trainers	Gad J. Bensinger, PhD	Director, Cook County Criminal Justice Training and Leadership Development Program, Public Service Institute, City College of Chicago
		Edward A. Kazemek	Coordinator, Leadership and Organization Development Activities, Criminal Justice Training and Leadership Development Program. Partner and senior associate in CONSULT, Ltd., an Illinois-based consulting firm.
1982	Speaking from experience..."Professional development for new trainers"	Martin M. Broadwell	President, Resources Inc., GA. Director of engineering training at Bell Telephone Company, he taught management training at the Executive

Year	Title of article	Author(s)	Author(s) details
1971	How do your trainers grow-Considerations in the design of a train-the-trainer program	Paul H. Chaddock	Management Institute at the University of Michigan for twenty-seven years. Manager, Education Systems, Addressograph Multigraph Corporation, OH
1973	Partners in training-A train the trainer program	William Watson Hines, III	Senior Representative, Training and Manpower Division, Consolidated Edison Company, NY; Vice President, ASTD, NY Chapter; Chairman, Brotherhood In Action Committee
		Donald Lilenfeld	Director, Training and Education, New York Restaurant Productivity Development Center; He held a senior staff position with the American Management Association.
1974	Train supervisors to train	Larry E. Short, Doctor of Business Administration	Assistant Professor, Management, Drake University, Ia. Held positions in federal government previously. Members of Academy of Management, ASTD, and International Personnel Management Association.
1974	Professional development opportunities for trainer	Thomas F. Hatcher	President, Thomas Hatcher, and Associates, Texas. Member-Audio-Visual Instruction, National Association of Educational Broadcasters
1978	You and effective training-Part 1 and 2	John S. Randall	Manager, Operations Training, Anheuser-Busch Inc., Mo.
1979	Training trainers on a tight budget	Robert L. Schoonmaker	Director, Training and Development, Provident National Bank. He has served in companies in computers, engineering, and banking. Also served as consultant to educational, manufacturing, religious and nonprofit organizations
1981	Training non-trainers for training	Lyle Sussman, PhD Edwin Talley III Virginia Pattison	Assistant Professor, University of Louisville, School of Business, KY University of Louisville, School of Business, Louisville, KY Personnel communications manager, Dairymen, Inc., Louisville, KY.

Details of authors in Table 11 provide evidence of how *training the trainer* is a concern in disparate fields (e.g., banks, universities, and engineering firms etc.)

As shown in tables 9, 10, and 11, majority of the ASTD articles provide details of the authors which has helped me to understand what authorities have been used to make articulations about training trainers. While ASTD has not consistently followed the same format when introducing the authors, the articles have included details about educational qualification, institutional affiliation (current and past), expertise, and awards received by the author(s), among other things. Details that ASTD includes in the article have played a strategic role. As will be discussed later in the chapter, ASTD has a paucity of empirical studies that we take for granted in academia. In the absence of *traditional* claims to the rigor in academia, ASTD has implicitly used the author's educational qualification, institutional affiliation (current and past), expertise, and list of awards to provide the authors the authority to *speak*. Thus, practitioners, by establishing their expertise through examples of prior work, their current or previous institutional affiliation, and relationships with partners like ASTD, provide credence to their claims. As shown in tables 9, 10, and 11, experiences in the business world are discussed alongside various professors' educational and academic standing. This again is a strategic move to demonstrate the academics writing for the ASTD are not those that belong to the *ivory tower of academia*, which in turn provide relatedness and acceptability to the academics in the eyes of practitioners.

### ***Rules in Play***

As noted in Chapter 3, in this dissertation, I have been guided by multiple questions based on the *rules* Foucault articulated in *Archaeology of Knowledge*. In the following section, by using the questions mentioned in Chapter 3 as prompts, I discuss how certain statements about train the trainer have been sayable and repeatable in ASTD literature. However, I have not used the rules that Foucault has noted in *Archaeology of Knowledge* in the same sequential order as it appears in the book. Scholars like Gutting (1989) have noted that the rules Foucault



articulated in *Archaeology of Knowledge* are not immediately visible in his own books and the difficulty is not the impossibility of using the rules in other empirical projects. In the sections below, I list a rule from *Archaeology of Knowledge* along with a question I developed based on the rule and proceed to discuss what I have gleaned from the ASTD documents using the stated rule.

*Surfaces of emergence: What social locations like the family are the places where objects of the discursive formation of training & development emerge<sup>61</sup>?*

Per Foucault (1969/1972), “surfaces of emergence” (p. 41) are the social locations where objects of a discourse are first discussed, designated, and acted upon. Gutting (1989) further elaborated how social locations such as family can be the surfaces of emergence for certain objects:

in modern society, children whose behavior is sufficiently deviant from social (e.g., familial) norms are judged mentally disturbed and hence become an object of concern for psychopathology. Thus, the family is a surface of emergence for objects of the discursive formation of contemporary psychopathology. (p. 234)

Analysis of ASTD shows that during the first period, the knowledge regarding training emerged from both the shopfloors of industries and the training halls in white-collar environments. As the training field matured, training in the shopfloor became a concern for fields like Vocational Education and Technical Colleges, although this information is not discussed in the ASTD publications. Thus, in the second period, the knowledge increasingly moved away from the

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<sup>61</sup> This sentence contains two parts: the first “*surfaces of emergence*” refers to one of the rules in Foucault’s *Archaeology of Knowledge*. The second part contains the question that I developed based on the rule. I have questions like these to interrogate the ASTD literature.

shopfloors to the corporate training setups of both manufacturing and non-manufacturing organizations.

*Authorities of delimitation: What are the authorities of delimitation (i.e., institutions which possess the authority) to speak about the various objects in T&D?*

Foucault (1969/1972) explained that objects come into existence on certain surfaces from utterances of authoritative figures. Thus, in the nineteenth century, the society provided medical professionals like doctors the “authorities of delimitation” (p. 41) to delimit what could be spoken about *madness*. He noted that,

in the nineteenth century, medicine (as an institution possessing its own rules, as a group of individuals constituting the medical profession, as a body of knowledge and practice, as an authority recognized by public opinion, the law, and government) became the major authority in society that delimited, designated, named, and established madness as an object. (pp. 41-42)

The analysis of various ASTD documents shows that various groups (practitioners, academics, and ASTD office bearers) have had the authority to speak (authorities of delimitation) about multiple objects in the training field. In contrast to the period before WWII, where industrial relations and personnel management professionals working as managers (e.g., CR Dooley, Walter Dietz, William, Conover, & Michael J Kane) had the authority to speak, in the post-WWII period, a large number of academics including those from the psychology fields started writing about training. Further, in the second period, the composition of the speakers again changed. Until the early 1990s, all the three aforementioned groups were speaking in ASTD publications, but from the mid-1990s, there was a sharp decrease in the voices of academics. An extensive discussion on this particular phenomenon is discussed in Chapter 5.

*Grids of specification: In what ways have the objects been classified, organized, divided, and regrouped in T&D?*

Foucault (1969/1972) noted that something is sayable only under particular “grids of specification ... the systems according to which the different [objects] 'kinds of madness' are divided, contrasted, related, regrouped, classified, derived from one another as objects of psychiatric discourse” (p. 42). My analysis shows that the authors in ASTD classified, organized, and divided various concepts (e.g., trainer) relating to training (training objects) in multiple ways. Training objects were organized under different categories like the variety of trainers (e.g., professional trainer, non-professional trainer, occasional trainer, etc.), training professionals (e.g., training director, training professional with an appropriate academic degree, etc.), and employee types (e.g., staff vs. line, employees needing training, employees providing training, employees facilitating training, etc.). Analysis of the mechanics of presenting information in the ASTD journals reveal authors in ASTD are delving deeper into ever-narrowing topics (e.g., measuring returns of investment while evaluating training), extending knowledge of facts established as *truths* (e.g., training is essential to improve human capital), increasing efforts to increase the accuracy of facts (e.g., conducting studies to validate findings from competency models), and resolving ambiguities (e.g., designing training using *scientifically validated* instructional system design). The field is showing signs of becoming *normal science* in the Kuhnian tradition (Kuhn, 1970), with a supposedly established body of knowledge through the process of knowledge accumulation, a hallmark of logical positivism.

In the preceding section, by answering three questions derived from Foucault’s rules of formation, I have discussed the various rules relating to the formation of training objects and noted where training objects emerged, who had the authority to make those assertions, and how

the objects were classified and organized. Foucault (1969/1972) argued that in addition to understanding the rules of formation, it is necessary to explore the conditions that make it possible to utter certain statements. He labeled this *step* as the “formation of enunciative modalities” (p. 50) which focuses on who is [allowed to be] speaking, in what institutions or settings is it proper to be spoken, and what is the speaker’s relation to the object being spoken about speaking about? Gutting (1989) discussed how exploring the *formation of enunciative modalities* about *madness* in the nineteenth century revealed that “only those properly trained and certified ... [could] ... make authoritative medical statements”, through a “report of a hospital laboratory test, [or] an article in The New England Journal of Medicine, or [as an] advice to a patient of a physician in private practice” (p. 235).

*Formation of enunciative modalities, i.e., under what conditions have the various statements about the different training objects been enunciated and examined?*

Historically, industrial relations and personnel management professionals with first-hand experience in organizations and academics with industry experience had the authority to speak about the various training objects. In the first period, many *speakers* had a direct relationship with the objects being written about since the *speakers* were involved in managing the objects or worked in the same organization along with academics who also had practitioner experience. In the second period, in addition to these two groups of speakers, academics without any direct working experience in the training function and consultants with or without direct experience in training functions started to speak in ASTD publications. While the speakers were predominantly male and from the United States in the first period, there was a higher number of female voices in ASTD during the second period. However, the authors are still predominately from the United States.

Foucault (1969/1972) noted that something becomes *sayable* and coherent only when relations exist between different objects or in the presence and absence of certain concepts. Thus, to explore the relationships between various training and development concepts, in the following sub-section, I have explored the *forms of succession and dependence* (guided by the question: *how are the training statements combined into a single discourse?*) and *field of memory* (guided by the question: *What are the statements that are no longer part of a field of presence but to which significant relations continue to exist?*) I used these rules and questions to illustrate how training the trainer articulations have occurred in ASTD and how the TTT articulations do not discuss many significant issues.

The articulations on trainers and the need to train trainers in ASTD have not occurred in a vacuum. The conversations on training the trainer occurred with the broader discussions on the need to develop and improve the skills of training personnel in general. Statements about trainers and training the trainer depended on the articulations about training directors and the training function in general. Arguments on the need to train the trainers made sense and became possible only because there was a broader conversation on the need to upskill the training personnel. Further, the focus on both the training director and the trainer is indicative of the modern episteme. Foucault (1966/1970) had noted that a key feature of the modern episteme is the *man* becoming the primary subject matter of the empirical sciences: *man* is both the subject conducting the study and the object of the study.

Per Foucault (1969/1972), *field of memory* contains statements that are no longer part of a field of presence but to which significant relations continue to exist. Some significant texts, events, and viewpoints are forgotten in the ASTD literature in this period, with a few exceptions. One set of forgotten documents relate to the work that came out of both the World Wars. Fields

like industrial and organizational (I/O) psychology, human resource development (HRD), and adult education have noted that the work of the U.S. Government through the War Commission – Training within the industry (TWI) and its primary tool job instructor training (JIT) programs – laid the foundations of modern training and development in the U.S. ASTD publications are largely silent on JIT programs<sup>62</sup>. However, the four-step model of JIT appears infrequently in ASTD publications. References to TWI are largely absent, as is the contribution of the U.S. military. Similarly, historical texts on instructor training (e.g., Allen, 1919; 1921) that came out of training provided to dockworkers in WWI are also not referenced nor discussed in ASTD. Another set of arguments relates to the texts belonging to the field of psychology. There was limited acknowledgment towards academics from the field of psychology. Among the different sub-fields of psychology, scholars from the field of I/O psychology have been prolific authors of empirical, conceptual, and theoretical articles and textbooks on training (e.g., Bass & Vaughan, 1965; Lynton & Pareek, 1967; McGehee & Thayer, 1961) from the early days of the field. While there is evidence that authors like McGehee authored articles in the early years of ASTD (e.g., in 1948), they subsequently stopped publishing articles in ASTD publications. Possible reasons might have been the continuous insistence of I/O psychologists that ASTD authors did not engage in *scientific research* in training, possible reluctance for research that required "securing data under *conditions so controlled* that the conclusions we draw from these data are valid and reliable" (McGehee, 1948, p. 6, emphasis added), and the feeling that articles in ASTD presented themselves as atheoretical opinions. However, psychologists like Gordon Lippitt, ASTD president in 1969, have been an integral part of ASTD and have had a long-lasting influence on

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<sup>62</sup> In a curious turn of events, JIT program (which one ASTD author had critiqued for its weakness) was *exported* to Japan after WWII during the rebuilding of the country. JIT was extensively used in Toyota to great success and returned to the U.S. when Toyota started manufacturing vehicles in the U.S.

the association, aspects of which I will briefly illustrate when discussing the publications in the *competency* period. With a few exceptions (e.g., Goulette, 1960; Lippitt, 1969), concepts relating to adult learning were not discussed in the ASTD publication in contrast to the present when various concepts from the adult learning field are being used extensively. Although the Adult Education field was already a mature field by the mid-1950s based on the work of American scholars and philosophers like Lindeman, Dewey, etc., adult learning theories and concepts are conspicuous by their absence in this period. However, although limited in number, even in the early decades of ASTD, there were instances of discussion of the role of learning theories in training (e.g., Guerin, 1965; This & Lippitt, 1966; 1979).

### **Section Summary**

In this section, I have discussed what has been articulated about training trainers in ASTD. By mobilizing various *archaeological rules*, I have *found* that different groups of individuals (e.g., practitioners and academics) have made certain assertions about training the trainers. The authors have used their institutional positions (e.g., managers and educators) and used their authority derived through hands-on experience or theoretical know-how to make certain assertions about training the trainer. The assertions on training the trainer have also become possible by classifying and organizing various training objects in various ways and by relying on concepts like *scientific research* located in the broader domain of social science. I have also discussed some historical concepts that are no longer part of the ASTD literature but to which significant relations continue to exist.

In the second section, I further the discussion in Section 1 by focusing on a key ASTD publication – *INFO-LINE* – that has been the key publication used to train subject matter experts. I first provide a brief introduction on *INFO-LINE*, followed by a discussion of how *INFO-LINE*

can be understood in the overall history of ASTD and how specific assertions in the broader ASTD literature made particular articulation of train the trainer (TTT) possible. Section 2 is also guided by two archaeological rules and questions that I developed from the rules: *field of presence* (what are the statements that are taken up from elsewhere but are accepted as part of T&D?) and *field of concomitance* (what are the statements from other discourses that are used analogically, as models, or in some legitimizing function in T&D?)

## **Section 2: INFO-LINE**

In this section, I further the discussion on how certain articulations about the train the trainer have been made in ASTD by focusing on a key ASTD publication – *INFO-LINE* – that has been the key publication used to train subject matter experts. I also discuss the statements that are taken up from elsewhere but are an accepted part of ASTD’s train the trainer materials and the statements from other discourses that are used analogically, as models, or in some legitimizing function in *INFO-LINE*. In 1984, two years before ASTD declared its intention to convert their flagship publication into a practitioner-friendly publication, ASTD had started publishing a booklet series christened *INFO-LINEs* (now known as *T.D. at work*). It is within the pages of *INFO-LINEs* that the majority of authoritative discussion on the train the trainer has taken place in ASTD. I first provide a brief introduction on *INFO-LINE*, followed by a discussion of how *INFO-LINE* can be understood in the overall history of ASTD and how specific assertions in the broader ASTD literature made particular articulation of train the trainer (TTT) possible.

Review and analysis of the voluminous ASTD publication reveal that both subject matter experts and TTT have been central objects in different types of ASTD publications. In addition to being articulated in the association's journal, magazine, and books published by ASTD, both



concepts have been central in *"INFO-LINE (now T.D. at Work)*, a monthly publication designed to train the trainer in a broad array of topics" (ATD, 2018b, p. 35).

ASTD started publishing *INFO-LINE* in October 1984 as a "monthly series of 'how-to' booklets prepared by ASTD in an easy-to-use format" (ASTD, 1984)<sup>63</sup>. ASTD only announced the start of the publication through an advertisement in the September 1984 edition without any formal communication in the pages of its journal. The advertisement also announced the publication of the following sixteen issues covering different facets of training: *"How to prepare and use effective visual aids," "15 Alternatives to Lecture," "12 Great Games and How to Use Them," "Get Results from Role Play and Simulations," "Be a Better Needs Analyst," "Adult Learning: A Practical Refresher," "Success in Choosing Training Media," "Make Job Aids Work," "Business Basics: What Managers Want Trainers to Know," "Two Dozen Essentials for Evaluation," "Write Better Behavioral Objectives," "How to Create a Good Learning Environment," "50 Safe Cost-Cutting Tips for Trainers," "Surveys, From Start to Finish," "What You Need to Know About Computer-Assisted Learning," and "16 Ways to insure Impact from Training Films"*.

*INFO-LINE* and its current version, *T.D. at work*, have been published in two different forms: standalone products focusing on a specific topic and as a multi-volume collection. A review of the standalone issues focused on SMEs and multi-volume collections concentrating on the train the trainer concept reveals a typical pattern that has remained primarily uniform over the decades. I engage in an extensive analysis of this peculiarity after I briefly introduce single- and multi-issue *INFO-LINEs*. Table 12 outlines three different *INFO-LINE* issues in three

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<sup>63</sup> This citation does not have a page number since this quotation appeared in ASTD's advertisement about *INFO-LINE* and ASTD did not number the pages containing the advertisement.

different decades that focused on developing subject matter experts as trainers. As shown in Table 12, despite being published in three different decades, the content has remained very similar.

**Table 12**

*Outline of Sample INFO-LINES*

Name of the <i>INFO-LINE</i>	Teaching SMEs to teach (1999)	Trainer for a day (2008)	Basic training for trainers (2016)
Topics listed in the Table of contents	<ul style="list-style-type: none"> <li>• What is an SME?</li> <li>• Selecting an SME trainer</li> <li>• Preparing the SME to train</li> <li>• Methods of delivery</li> <li>• Course design/development for SMEs</li> <li>• Stand up and deliver</li> <li>• Follow-up training into the workplace</li> <li>• Evaluating the training effort</li> </ul>	<ul style="list-style-type: none"> <li>• The occasional trainer</li> <li>• Adult learner preferences</li> <li>• Analyze the purpose of training</li> <li>• Write goals and objectives</li> <li>• Design instructional materials</li> <li>• Deliver your training</li> <li>• Manage your training materials</li> <li>• Job aid: Training design checklist</li> </ul>	<ul style="list-style-type: none"> <li>• Who is a trainer?</li> <li>• Learn how to train</li> <li>• Adult learning theory</li> <li>• Training methods</li> <li>• Presentation and facilitation</li> <li>• Evaluation</li> <li>• Managers as trainers</li> <li>• Four-step skills training method</li> </ul>

In addition to the *INFO-LINES* such as the ones briefly discussed above, a series of *INFO-LINES* also exist that focus on many of the sub-topics listed in the outlines *INFO-LINES* focusing on SMEs. For example, some issues delve into training needs analysis, designing training materials, learner styles, designing survey instruments, conducting different types of evaluation, etc.

ASTD has also published multiple *INFO-LINES* as collections in a single-volume format and multi-volume format. While single-volume collections usually contain various issues on one particular topic (e.g., instructional design), multi-volume collections (generally having four

volumes) are typically published under the *train-the-trainer* title. In Table 13, I provide an overview of the multi-volume train-the-trainer collection published in 2016.

**Table 13**

*Table of Contents of Train the Trainer Collection*

Volume 1	Volume 2	Volume 3	Volume 4
Foundations and delivery: The basics to becoming a successful trainer	Instructional design and implementation: The tools for creating a training curriculum	Training programs: Training for the new reality	Measurement and evaluation: Essentials for measuring training success
Basic training for trainers	The basics of ISD revisited	The positive workplace	Essentials for evaluation
Jump-start your learning objectives	Aligning training and client expectations	Learning through transmedia storytelling	Evaluation data: Planning and use
The learner-centered classroom	Scenario-based e-learning	The manager's guide to employee development	The four levels of evaluation – an update
Powerful storytelling techniques	Selecting and implementing an LMS	Developing a leadership strategy	Demystifying measurement and evaluation
Basics of stand-up training	Lesson design and development	Managing the virtual workforce	10 tactics for a sustainable evaluation process
Ensuring learning transfer	Successful global training	Creating a modern mentoring culture	Using the experience API to track learning
Managing difficult participants	Applying learning theory of mobile learning	The art and skill of collaborative leadership	Develop valid assessments
Memory and Cognition in learning	Using prototyping in instructional design	Developing high-performance leadership teams	Enabling success through learning and knowledge sharing
Turning trainers into strategic business partners	Fostering resilient and change-ready employees	Talent engagement across the generations	Making the financial case for performance improvement
Make every presentation a winner	Designing for informal learning	Maintaining cohesiveness in a distributed government workforce	How to collect data
Game design for learning	Creating training manuals	Designing for the virtual classroom	How to develop training quality standards

Volume 1	Volume 2	Volume 3	Volume 4
Effective classroom training techniques	Basics of e-learning revisited	Applying social tools to learning	How to evaluate instructional materials
Critical competencies for 21 <sup>st</sup> century leaders	Agile and LLAMA for ISD project management	The futurist leader	Blended learning that works
Creative facilitation techniques for training	Design engaging software training	Creating an internal coaching program	Data collection for needs assessment
Create better multiple-choice questions	Using video in e-learning	Leveraging diversity & inclusion for a global economy	Creating an internal certificate program

As can be seen in Table 13, multi-volume train-the-trainer collections provide extensive resources that new trainers can use to train themselves. The individual *INFO-LINES* in the multi-volume issues can be read and understood independently without recourse to any other *INFO-LINES* in any of the four volumes. A review of the *INFO-LINES* reveals that most authors and editors<sup>64</sup> are non-academics and ASTD office-bearers.

Review of *INFO-LINES* that focus on training the trainers (similar to the ones mentioned in Table 12) reveals that despite being published under different names (e.g., *Teaching SMEs to teach* (1999), *Trainer for a day* (2008), and *Basic training for trainers* (2016)), the content is similar. Without exception, *INFO-LINES* that focus on training the trainers discuss concepts like adult learning theories and andragogy, four-level evaluation models, competencies, learning styles, delivery styles, etc. Further, the information is also *packaged* in a similar manner irrespective of the content. To further illustrate this practice, I present an excerpt from a 2016 *T.D. at work* issue *Basic training for trainers* that was part of a four-volume *Train the trainer*

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<sup>64</sup> For reasons that are not clear, some *INFO-LINE* issues do not mention the name of the author and just list the name of the editor. On the other hand, issues that list the author's name may or may not have the editor's name listed.

*collection* in Figure 5. I am using this particular excerpt for two reasons: first, it exemplifies how arguments are made to support the need for SMEs to train in ASTD literature and non-ASTD train the trainer literature. The second reason is that this excerpt closely matches all three train the trainer programs that I have attended in Malaysia, India, and Nepal.

## Figure 5

*Extract of Introduction in INFO-LINE*

### LEARN HOW TO TRAIN

As a trainer, you must possess four basic areas of skills and knowledge:

- learning theory
- training methods
- presentation and facilitation
- evaluation.

For the purposes of this issue, we assume that you will present a packaged training program—one that was designed with an instructional systems development (ISD) model. See the What Is ISD? sidebar for more information on ADDIE and SAM, two popular instructional design models. In addition, we assume that you have a level of content mastery (see the Content Mastery sidebar for details). To begin your journey as a polished trainer, check out the basic competencies you'll need, found in the Basic Trainer Competencies sidebar and the Dos and Don'ts for the New Trainer sidebar.

### ADULT LEARNING THEORY

A key aspect to a successful training program is understanding how adults learn and retain information. Generally, adults need active involvement, and they need to understand the relevance of the information to their job or organization in order for them to retain the information presented.

Malcolm S. Knowles, an adult-learning theorist, says that adult learners:

- need to see the relevance of the training to their own life experience
- learn best when they have a measure of control over their learning experience
- like to apply their own experience and knowledge to the learning
- benefit from task- or experience-oriented learning situations
- learn best in cooperative climates that encourage risk-taking experimentation.

What's more, adult learning is most effective when the learner can satisfy a personal goal or need. According to Knowles, adults will respond to extrinsic factors, such as promotions, job changes, or better working conditions. However, intrinsic motivators, such as self-esteem, recognition by peers, better quality of life, greater self-confidence, or the need for achievement and satisfaction, can be even more motivating.

Ultimately, remember that your objective is to increase performance through a change in behavior. The adult learner generally goes through the following four levels of learning to reach the level of behavioral change:

- Awareness: Participant says, "I've heard that!"
- Understanding: Participant recognizes the subject matter and then explains it.
- Practice: Participant actually uses the learning on the job.
- Mastery: Participant can use the acquired knowledge to teach others.

Learning styles and preferences, which have been a staple in the training industry for years, are now being questioned by some recent research. However, learning styles are still considered by many trainers to be an important way of keeping delivery style interactive and interesting.

#### TRAINING METHODS

Traditionally, trainers led instructive-style learning sessions. Many now believe that the facilitative or participatory training style-in which the trainer guides the learners to discover what they need to learn-is more appropriate for adult learners. This trainer-facilitated and learner-centered environment better suits the adult learning styles noted above.

A cursory review of the excerpt reveals the author has used specific strategies to make the claims. Articulations on how a trainer should train and what a trainer needs to master are made on the strength of particular models [e. g, ISD – instructional systems development and Bloom’s taxonomy] and the work of certain scholars [Malcolm Knowles – an adult-learning theorist]. Foucault (1969/1972), while describing the *field of presence*, noted that “statements formulated elsewhere [are] taken up in a discourse, [and are] acknowledged to be truthful, involving exact description, well-founded reasoning, or necessary presupposition” (p. 57). Authors in ASTD have used statements from fields like instructional system design (which in turn is based on literature from the U.S. military), curriculum theory, and adult learning to make *truth* claims on how trainers need to train and what trainers need to learn to be competent trainers. By *repeating* statements from outside of the training field that are seen as *truthful*, ASTD authors have imported external discursive ideas into the training literature.

**Use of references.** The excerpt also directs the reader to *sidebars* to learn more on different topics; the sidebar then cites and lists *other INFO-LINE* issues to read the subject further. The citational practices visible in this 2016 *INFO-LINE* are witnessed from the first *INFO-LINEs* published in 1984. Although ASTD has primarily been practitioner-focused, from the early days of ASTD, there has been an ongoing conversation on the need for assertions to be based on *research* (e.g., Lippitt, 1964; McGehee, 1948; Miller & Barnett, 1986; Nadler, 1979). Foucault (1969/1972), while explaining the *field of concomitance*, noted that statements from other discourses could be used analogically to legitimize articulations in another field. Although the authors publishing in *INFO-LINE* are predominantly practitioners and ASTD office-bearers, the authors have borrowed the citational practices observed in the academic literature. The liberal use of citations, cross-referencing other ASTD publications, including other *INFO-LINEs*, and listing references in *INFO-LINEs* has allowed ASTD to demonstrate that ASTD's assertions on SME and TTT are based on an established body of literature.

Many of the names used as references and resources at the end of the booklet are figures that have become well-known in the training field worldwide in the last few decades (examples are displayed in Table 14). Because of the way in-text citations and references at the end of the booklet are used, it is not immediately clear how the references at the end of the booklet have been used, where in the text they have been used or whether the references are just part of a recommended reading list. However, the use of references and a list of resources accord the *INFO-LINEs* an academic appearance, in contrast to the majority of ASTD articles that appear as opinion pieces. Some of the names listed in the reference are illustrated in Table 14 in the next page.

**Table 14***Example of Authors being Cited in INFO-LINE*

Name	Details
Chuck Hodell, PhD	Professor – bestselling author of different books on ISD. Hodell has designed thousands of training programs for the White House, major corporations, nonprofits, numerous apprenticeship programs, and assisted clients in Egypt, Africa, Europe, and other locations worldwide.
Donald Kirkpatrick, PhD	Professor – expertise in the evaluation of training and a frequent contributor in ASTD from the 1950s. Kirkpatrick's four-level evaluation model is used across the world in all varieties of organizations.
Malcolm Knowles, PhD	Professor – frequently referred to as the father of American andragogy.
Patricia McLagan	Practitioner/Consultant. Adjunct Professor. Author of ASTD's 1983 competency study – widely acknowledged as a game-changing document in the field of HRD and T&D. Awarded ASTD's highest award, the Gordon Bliss Memorial Award.
Richard Swanson, PhD	Professor – Well known scholar in the HRD field, a proponent of the <i>performance</i> focus in HRD
Sharan Merriam, PhD	Professor – widely published author in the field of Adult Education.
William Rothwell, PhD	Professor - Author of ATD's 2013 competency study – a well-known and widely referenced scholar in various fields.

While this particular *INFO-LINE* in 2016 also has several practitioners listed in the reference section, a review of the *INFO-LINEs* focused on SME and TTT reveals that a core corpus of scholars (Table 14 provides examples of such authors) and models have been frequently mobilized to make arguments on SME and TTT. These scholars and models which have been referenced are well known in the field; some of these scholars (e.g., Kirkpatrick and Knowles) are revered by a large section of the practitioner field and have a corpus of publication spanning decades, fields, and countries. A discussion of how the work of certain scholars and certain concepts have become central in discussions of SME and TTT is discussed in Section 3 of this chapter.



**Presentation of the material.** All *INFO-LINEs* have followed a similar stylistic and semantic form. The booklets are easy to read, have clear language, convey an unambiguous message on what is needed and what needs to be known, and clarify that the focus of training is to change behavior and ultimately improve performance. In the 1965 September edition of *ASTD's Journal*, Rob Jones, Manager: Employee development, Arizona Public Service Company, Phoenix, Arizona, offered the following suggestion to future writers in the *Journal*:

When you write for *Training Director's Journal*, do this:

- (1) make it brief,
- (2) say something I can get my teeth into (not mere reports of further inconclusive studies), and
- (3) give me a summary which I can review quickly. Like this. (p. 22)

Jones wrote the article containing the above quote in response to an article published in June 1965 in the *Journal* by John J. Thibodeau. Thibodeau of the Great Northern Paper Company, Millinocket, Maine had lamented about the quality of writing in the *Journal* and desired articles that informed readers quickly and accurately:

It seems to me that any professional article should strive to inform its readers as quickly and as accurately as possible. Most of the *Journal's* articles fail to do this. Most of the articles are elongated, rambling lectures written from the heights of Olympus wherein the writer deigns to inform all lesser beings about training as it is understood by the gods. (p. 46)

About two and half decades after Jones and Thibodeau had argued for simple and brief articles that could be quickly digested by the reader, the editor of *ASTD's Journal* in April 1991 noted that

Since Laird's death in 1984, the Woodlands Group (a consortium of HRD professionals from different organizations) has given the annual Dugan Laird<sup>65</sup> Award for Excellence in Writing in the Field of Human Resource Development. The monetary gift goes to writers whose work demonstrates qualities espoused by Laird, such as readability, practicality, and a lack of stuffiness. (p. 4)

By presenting quotes from two practitioners and one highly regarded academic in the T&D and HRD field that were made around twenty-five years apart, I am illustrating how the broader conversations on a particular style of writing have made it possible for a specific writing style to exist in the *INFO-LINE* publications. Further, these are again another set of examples of how ideas existing outside the training field have been taken up in ASTD publications. Calls for transparent language have been a key leitmotif of humanism with the belief that language that is transparent can describe the real world (Aghasaleh & St. Pierre, 2014; Berbary, 2017; Davies, 1991). However, Lather (1996) has discussed how the call for transparent language and clear speech is itself a “part of a discursive system, a network of power that has material effects” (p. 528) and reflect efforts to maintain the status quo and reinforce “how things already are” (Berbary, 2017, p. 723).

In addition to the above, some less salient but nevertheless critical points have allowed publications like these (*Basic training for trainers*) to come across as must-read publications for new trainers related to the publication process. First, publications like *Basic training for trainers* appear to have immediate authority since ASTD is the publisher. Second, *Basic training for trainers* is authored by Cat Sharpe Russo – a well-known and regular author and editor of

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<sup>65</sup> “Dugan Laird wrote *Approaches to Training and Development*, considered by many to be a classic in the field. His articles and columns have appeared in virtually all of the HRD professional journals.” (ASTD, 1991, p. 4)

numerous ASTD booklets. Third, ASTD decided to publish *Basic training for trainers* multiple times in two decades, showing its importance. *Basic training for trainers* was published as a single issue in 1998 and 2003 and was a part of popular multi-volume compendiums in 2008, 2016, and 2017.

In addition to what is stated in *INFO-LINE* issues, what remains unstated is equally essential. *INFO-LINEs* are largely silent on the fact that the core of the support used to make arguments in these booklets (e.g., work of Knowles and Kirkpatrick) is frequently critiqued in the *academic* fields of I/O Psychology, HRD, and Adult Education. Also absent (with a few exceptions) is the voluminous and important work in the aforementioned three fields, even when the work in those fields is directly focused on various facets of training. Further, even when criticisms of ASTD's arguments are acknowledged, those criticisms do not overtly change the practices ASTD has argued for decades. For example, while *learning styles* has been heavily critiqued in different fields, ASTD continues to find value in them, as noted in the 2016 *Basic training for trainers*:

Learning styles and preferences, which have been a staple in the training industry for years, are now being questioned by some recent research. However, learning styles are still considered by many trainers to be an important way of keeping delivery style interactive and interesting. (p. 3)

Although ASTD has been the publishing materials on SME and TTT on a voluminous basis through different types of publications, it was certainly not the first one. As far back as 1921, books like *Instructor training* were already being published. Books like these, which directly impacted the later work of the U.S. War Commission's TWI project in producing materials on job instructor training, are largely forgotten in ASTD publications.

## Section Summary

Foucault (1969/1972) has noted that during the process of discursive practices coming into existence and sustaining themselves, statements are taken up from elsewhere but become an accepted part of a discourse (*field of presence*) and that statements from other discourses are used analogically, as models, or in some legitimizing function in a discourse (*field of concomitance*). In this section, I provided an overview of *INFO-LINE*, the key publication used to train subject-matter experts in ASTD. Although a practitioner-focused publication, ASTD has borrowed *citational practices* from the broader academic field and used the citational practices to provide *INFO-LINEs* credibility. The strategic use of citational practices and the call for *scientific research* reflective of the concerns in the broader field of social sciences has implicitly allowed *INFO-LINE* to continue being published in a uniform way from the mid-1980s. I also discussed how the content and style of presenting the information have not significantly changed since 1984 when *INFO-LINEs* started being published. However, non-academics and ASTD officer bearers have predominately authored the *INFO-LINEs* in contrast to the authorship trend in ASTD journals. In the next section, based on what I have discussed in section 1 and section 2, I discuss how certain concepts like *andragogy* have become foundational in ASTD publications concerned with training trainers.

## Section 3: Andragogy – A Foundational Concept

In section 1 of this chapter, I noted that different groups of individuals (e.g., practitioners and academics) have made certain assertions about training the trainers. The authors have used their institutional positions (e.g., managers and educators) and used their authority derived through hands-on experience or theoretical know-how to make certain assertions about training the trainer. The assertions on training the trainer have also become possible by classifying and

organizing various training objects in various ways and by relying on concepts like *scientific research* located in the broader domain of social science. In section 2, I discussed how, by using *citational practices*, including calls for research borrowed from the broader academic field, publications like *INFO-LINEs* have become credible. In this section, I illustrate how the findings from sections 1 and 2 have combined to discursively produce certain *truths* in ASTD's training the trainer literature. I use *andragogy* as an example to discuss how certain concepts like andragogy have come to be seen as foundational in ASTD publications concerned with training trainers.

A review of *INFO-LINEs* focused on training trainers reveals that arguments for why trainers need to master specific skills are based on the findings of ASTD's various competency studies. For example, in the *Basic training for trainers* published in 2016, ASTD notes that "trainers should attain a level of proficiency" (p. 2) in two competency categories: training delivery and instructional design. The *INFO-LINE* explains that the categories and multiple competencies listed within the categories come from the "2013 ASTD Competency Study: The Training & Development Profession Redefined" (p. 2). Under the *training delivery* category, trainers are expected to master competencies like: manage the learning environment, prepare for training delivery, convey objectives, align learning solutions with course objectives and learner needs, establish credibility as an instructor, create a positive learning climate, deliver various learning methodologies, facilitate learning, encourage participation and build learner motivation, deliver constructive feedback, ensure learning outcomes, and evaluate solutions. Under the *instructional design* category, trainers are expected to master competencies like: conduct a needs assessment, identify an appropriate learning approach, apply learning theory which encompasses the collective theories and principles of how adults learn and acquire knowledge, collaborate

with others, design a curriculum, program, or learning solution, design instructional material, analyze and select technologies, integrate technology options, develop instructional materials, and evaluate learning design.

It is based on the competency lists noted above that *Basic training for trainers* authoritatively declares "as a trainer, you [participant in the train the trainer program] must possess four basic areas of skills and knowledge: 1. learning theory 2. training methods 3. presentation and facilitation 4. evaluation" (p. 3). A review of the ASTD literature shows that out of these four, *training methods* and *presentation and facilitation* do not have foundational models or theorists that are repeatedly used. Discussions on *training methods* revolve around different methods like lecture, group discussion, simulation and role play, games, panels, demonstration, and case study. Similar discussions on the *training methods* have existed in a voluminous manner in the ASTD journal from the 1940s. Issues like using effective openings, structuring and pacing the training, and developing a presence in the training hall, are discussed under *presentation and facilitation* in the *INFO-LINE*. Like *training methods*, discussions on different aspects of *presentation and facilitation* are visible in other ASTD publications but not in the same volume.

## **Learning Theory**

There are barely any ASTD publications on training trainers that do not discuss the importance of learning theory as they apply to adults. Thus, it is of no surprise that *Basic training for trainers* provides such importance to learning theory. As noted in the first part of this chapter, there is a long and distinguished lineage of adult educators in the U.S. A sizable, rigorous, and mature scholarship exists on different facets of adult learning. Thus, it is surprising that adult learning theories were virtually non-existent till the late 1960s and early 1970s in

ASTD. It was only with Malcolm Knowles's scholarship in the late 1960s and early 1970s that adult learning started to become a topic of concern. By the mid-70s, Malcolm Knowles was a reasonably well-known author in ASTD. Over the years, his work on andragogy, adult learning, and self-directed learning has been warmly accepted in the field to the extent that in large sections of the ASTD literature, andragogy translates to adult learning theories (e.g., Bell, 1989; Dailey, 1984; Daloisio & Firestone, 1983; Knowles, 1978; 1979; 1980). However, other liberal, progressive, humanist, and critical strands from the adult education field are barely discussed in ASTD. For example, Jack Mezirow, a popular theorist in the adult education field who has inspired research worldwide and countless conferences in different parts of the world focused on his work or his work's derivations, finds one mention (Gutierrez, 2021) in the whole ASTD database. Thus, it is not surprising the frequent criticism observed in the academic scholarship towards Knowles is absent in the ASTD literature. However, from 2006 a few scholars in the traditions of cognitive psychology have published a series of articles on cognitive load theory and how they are of importance to the training profession (e.g., Ferguson, 2015; Meacham, 2017; Sweller, 2006).

To help illustrate how authors like Knowles and concepts like andragogy have come to be seen as *truths* in ASTD publications, I now discuss certain events between 1968 and 1990 and how *truths* were discursively created in ASTD publications.

1926. The year the American Association for Adult Education was founded, Eduard C.

Lindeman, PhD, a pioneer and a significant philosopher of Adult Education in the United States, after a visit to Germany, authored the article *Andragogik: the method of teaching adults* in the journal *Workers' Education*. He further discussed the concept in his 1926 book *The meaning of adult education*. John A. Henschke (2009), a noted historian of

andragogy in the United States, has noted Lindeman was the first to use the term *andragogy* in the U.S. context.

1968. Malcolm S. Knowles, PhD labeled as "Lindeman's most celebrated intellectual heir" (Rachal, 2015, p. 1), was influenced by Lindeman's aforementioned classic book in the late 1930s to pursue a career in adult education (Henschke, 1973). In 1968, almost after a decade as a Professor at Boston University, he published two articles, *Andragogy*<sup>66</sup>, *not pedagogy*, and *How andragogy works in leadership training in Girls Scout*.
1969. Gordon L. Lippitt, PhD, Professor, and ASTD President, authors an ASTD article *Conditions for adult learning*, a small excerpt of which is appended in the next page.

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<sup>66</sup> Although Knowles has cited Lindeman in most of his book, it was mostly Lindeman's views of adult education and democracy. Lindeman's earlier use of andragogy was not cited by Knowles in any of his work. In his 1984 book, *Andragogy in Action* (a book that discussed how andragogy has been *in action* around the world), Knowles wrote:

... During the next 14 years [starting in 1960] I had a laboratory where I could apply principles of adult learning in a university setting; I had a time and motivation for doing research; and I had doctoral students to extend and deepen the research. During this period a theoretical framework regarding adult learning evolved. But I didn't have a label for it that that would enable me to talk about in parallel to the traditional pedagogical model (p. 5). I found the solution in the summer of 1967, when a Yugoslavian adult education, Dusan Savicevic, attended my summer session course on adult learning and at the end of it exclaimed, "Malcolm, you are preaching and practicing andragogy." I responded, "Whatagogy?" because I had never heard the term before. He explained that European adult educators had coined the term as a parallel to pedagogy, to provide a label for growing body of knowledge and technology in regard to adult learning, and that it was being defined as "the art and science of helping adults learn." It made sense to me to have a differentiating label, and I started using the term in 1968, in articles describing my theoretical framework for thinking about adult learning." (p. 6)

While communicating with Marti J. Sopher, who wrote a PhD dissertation *An historical biography of Malcolm S. Knowles: The re-making of an adult educator* at the University of Wisconsin-Madison, Knowles also noted that Lindeman had used the term previously "but he [Lindeman] would use it in an article that I never heard of or saw. It wasn't widely distributed. But Lindeman had picked it up" (Sopher, 2003, pp. 62-63).



I would like this month to talk with you about the conditions which are essential to adult learning. I would like to discuss some assumptions Dr. Malcolm Knowles of Boston University has said we can make about adults as learners and the implications of these assumptions for training methodology. — Adults enter a learning activity with an image of themselves as self-directing, responsible grown-ups, not as immature, dependent learners. Therefore, they resist situations in which they are not treated with respect. Implication for methodology: if adults help to plan and conduct their own learning experiences they will learn more than if they are passive recipients.

While Lippitt does not mention andragogy, he illustrates many of Knowles's ideas that ultimately appear in his assertions on andragogy and self-directed learning.

1970. Knowles publishes a book, *The modern practice of adult education: Andragogy Vs. pedagogy*. While his two articles do not seem to have had much impact, the book-initiated conversations on andragogy in both the practitioner and academic have lasted for over fifty years.
1972. Two years after the book's publication, a highly favorable review of the book appeared in ASTD's Journal (excerpt is displayed in the next page). The book was reviewed by Jan Margolis, Associate Director, Center for a Voluntary Society, NTL Institute of Applied Behavioral Science. NTL, globally known in action research, was founded in 1947 through funding from the United States Office of Naval Research and the National Education Association (NEA) under Kurt Lewin's leadership. Although Lewin died before he could join NTL, it was ably led by scholars like Kenneth Benne (Professor – Teachers College, Columbia University), Leland Bradford (Director of Adult Education, National Education Association), and Ronald Lippitt (the Professor University of Michigan and President ASTD. Margolis, who subsequently became the first woman elected as President of ASTD, was a voice that both practitioners and academics gave importance to.

This pragmatic resourceful book can be applied to all phases of adult education programming. It is entirely consistent (as is the author's life) with the new principle of andragogy - the art and science of helping adults learn. Organized as an inquiry into adult education, the book attempts to set up a dialogue between author and reader by asking readers to examine their own educational practices and to evaluate the author's assumptions about the learning and teaching of adults against their own experience. .... The Modern Practice of Adult Education is Dr. Knowles' personal statement of the assumptions and techniques upon which his highly successful practice has been built. It is clearly a significant contribution to the growing field of adult education.

1972. U.S. Social and Rehabilitation Service published *A trainers guide to andragogy, its concepts, experience, and application*. The document was authored by human resource consultants Ingalls and Arceri with consulting support from Knowles. The introduction of the guide notes that the *Trainer's Guide to Andragogy* was prepared in response to a government award "which issued a statement of fundamental needs for a Syllabus and Training Guide for the Training of Trainers" (p. vi). An entry in John Ingalls obituary notes the guide was "widely used by the U.S. Department of HEW, Social & Rehabilitation Services as a guide for Adult Learning Professionals throughout the world."
1973. John A. Henschke, for his doctoral degree, writes a dissertation titled *Malcolm S. Knowles: His contributions to the theory and practice of Adult Education*. After receiving his doctorate, Henschke went on to a distinguished Professoriate career in Adult Education. After Henschke, numerous other scholars have continued writing doctoral-level dissertations focusing on the work of Malcolm Knowles.
1975. Knowles presents a paper, *Principles of learning: The andragogical approach to training* in ASTD's national conference.
1977. Knowles and andragogy find a mention in *ASTD's Handbook* (2nd ed.) as follows:

The person responsible for the development of supervisors and managers must be not only an educator but also an "adult" educator who understands the distinctions—as expressed by Dr. Malcolm Knowles’—between "pedagogy" and andragogy" (adult learning). This person should provide an environment for learning by:

- Treating mistakes as occasions for learning
- Helping individuals to diagnose their own needs for self-improvement
- Involving participants in planning, carrying out, and evaluating their own learning activities
- Making use of the experience of participants for their learning
- Providing opportunities for participants to be exposed to "unfreezing" experiences
- Building training experiences around real-life problems, not predetermined subject content
- Providing immediate opportunities to practice new learnings with a sense of satisfaction

The first edition of the handbook published in 1967 did not have any entry on adult learning. In the second edition also, Knowles is the only scholar associated with adult learning.

1977. An African scholar, C. Kabuga, authors *Why andragogy in developing countries*, publishes it in *Adult education and development: Journal for Adult Education in Africa, Asia, and Latin America*.

1977. Knowles publishes *Core competency diagnostic and planning guide*, "a model of competencies for the role of general adult educator" (Pinto & Walker, 1978, p. 26)

1980. Knowles republishes his 1970 book as *The modern practice of adult learning: From pedagogy to andragogy* (Revised edition). The 1980 edition has a revised title. In place of *Andragogy Vs. Pedagogy* in 1970, the revised edition has *From pedagogy to andragogy*.

1980. An article titled *Andragogy in action* is published in the *European Journal of Training and Development*.

1984. Knowles publishes the book *Andragogy in action: Applying modern principles of adult learning*.

1990. Knowles republishes the Kabuga article in his book *The adult learner: A neglected species* (4th ed.).

1990. In this 1990 book *Workplace basics training manual. ASTD best practices series: Training for a changing workforce*, Anthony Carnevale, ASTD's Chief Economist, only cites Knowles while discussing adult learning.

Even though Lindeman has been among the towering figures in the U.S. Adult Education field for a century, his usage of *andragogy* did not receive much attention in both the academic and practitioner literature. It was Knowles' mobilization of the term during the years 1968-70 through journal articles and a book that *andragogy* started to gain traction in both academic and practitioner literature. By the time Malcolm Knowles started publishing on andragogy in 1968, he already was a professor with good standing in the academic world. He had also already embarked on what was a close working relationship with various non-academic bodies and thus understood the practitioner's world and concerns in workplace learning. As discussed in Section 1 of this chapter, Foucault's archaeological rules make it clear that authors like Knowles have been able to make their assertions based on their practitioner and academic experience. Knowles's academic degree and first-hand experience in working and consulting with various organizations provide him the authority to *speak* about andragogy. Further, as discussed in Section 1, Knowles's articulations about andragogy were only *sayable* in a particular "grid of specification" (Foucault, 1969/1972, p. 42) in the adult learning field, where theorists and practitioners were dividing, contrasting, regrouping, and classifying (Foucault, 1969/1972) various adult learning concepts.

Since Knowles's ideas on adult learning were introduced in 1969 to the ASTD by no less than the President of ASTD in a feature page titled *President's page* without a single negative

comment, it is safe to assume that Knowles's name and ideas would have been introduced to a relatively large body of the ASTD community. Further, Lippitt presented and elaborated Knowles's ideas in a manner that is both easy to understand and which could be immediately applied to workplace learning situations. Foucault (1966/1970) has noted that “rules of formation, which [are] never formulated in their own right, but are to be found ... in widely differing theories, concepts, and objects of study” (p. xii), “operate beneath the consciousness of the individual subjects” (Gutting, 2014, para. 26). I have discussed in Section 2 of this chapter the ongoing articulations in ASTD for the need for clear and simple language, which in turn is reflective of the calls for transparent language in the existing humanist milieu. While Lippitt does not directly refer to the calls for transparent language, his writing style is reflective of the broader conversations on writing styles and demonstrates how training literature can and needs to be written.

The positive book review in 1972 by Jan Margolis, an office-bearer from a globally known learning institution and a respected practitioner who would go on to be the first woman elected as President of ASTD, further helped cement Knowles's credentials in ASTD and encouraged people to engage with his work on andragogy and adult learning. The President and the future President of ASTD declared that Knowles' ideas are relevant and practitioner-focused. Somebody new to the field and a bit hesitant to use Knowles's work in all likelihood would be more confident by reading Lippitt's and Margolis's views and would have external references to justify using Knowles's ideas in their work.

By the late 1960s and early 1970s, Knowles' name and work started appearing in a wide variety of governmental documents. For example, his work appears in a 1976 US Civil Service Commission document titled *The employee development specialist curriculum plan: An outline*

*of learning experiences for the employee development specialist*. This document is considered by many to be one of the initial competency studies and has been frequently referenced across different fields. His name again glowingly appears in ASTD's first competency study in 1978. (His 1970 book is listed as one of the references.) These two works, plus the 1972 *A trainers guide to andragogy* published by the U.S. Social and Rehabilitation Service, give Knowles' ideas considerably more reach. In addition to a favorable environment in the academic and practitioner publications, Knowles's ideas favorably entered the Governmental discursive networks. As discussed earlier, the U.S. Government has been one of the most prominent training actors since the World Wars. Thus, becoming a crucial part of this discourse further strengthened Knowles's ideas as authoritative knowledge. Since his work was frequently used to design and analyze competency studies, it started appearing in the competency study reports. This then led to people writing instructional materials based on the competency study to use/demonstrate Knowles ideas. Foucault (1968/1998) noted that no text

exists by itself, it is always in a relation of support and dependence vis-à-vis other books [texts]; it is a point in a network - it contains a system of indications that point, explicitly or implicitly to other books, or other texts or sentences. (p. 304)

Not only is Knowles's work referenced across multiple governmental, academic, and practitioner discourses, Knowles himself continued his prolific writing and authored numerous books and articles in diverse fields like nursing. Further, not only did an academic like Henschke complete his dissertation focusing on Knowles's contribution to the theory and practice of adult education, but by disseminating the information that Knowles's work has relevance in *practice*, he made Knowles's work more accessible to a larger audience. Further, many other doctoral students who have focused their dissertations on Knowles' work have gone on to distinguished academic

careers. While there might be exceptions, professors who have deeply studied Knowles in their own studies would more often than not help their students advance and expand Knowles ideas and use Knowles ideas in a wide variety of empirical research. Knowles's concepts have existed in both practitioner publications of organizations like ASTD and academic artifacts like textbooks, syllabuses, term exams, and dissertations. Knowles's ideas have thus become both *objects* of discourses in fields studying training and an integral part of *fields of presence* (Foucault, 1969/1972) in discourses concerned with training trainers in the United States. This dual enactment has helped Knowles's andragogy to appear normal and *true* in ASTD publications and other training discourses even outside the United States. As noted earlier, one of the first international deployment of andragogy outside the United States was in 1977 by an African scholar, C. Kabuga, who authored *Why andragogy in developing countries* and published it in the *Adult education and development: Journal for Adult Education in Africa, Asia, and Latin America*. In a strategic move, in 1990, Knowles republished the 1977 article by Kabuga in the fourth editions of his popular book *The adult learner: A neglected species*. Non-American scholars then had non-Western references evidencing concepts like andragogy worked outside the U.S. Thus, as his ideas circulated and become being *spoken* globally, a subject matter expert like me in countries like Nepal is introduced and encouraged to use andragogical concepts while training adults. What was *sayable* and was *true* in the U.S. discourse about concepts like andragogy has become similarly *sayable* and *true* in the global discourse on training.

A final point that I discuss is the longevity of Knowles's ideas worldwide despite persistent critiques from many quarters for over four decades. Like Donald Kirkpatrick (evaluation model) and Jack Mezirow (transformative learning theory), Knowles was often open to criticisms of his writings and ready to revise his ideas when warranted. For example, after the

publication of his 1970 book, many scholars critiqued how Knowles had positioned pedagogy and andragogy as binaries (the subtitle of his book was *andragogy vs. pedagogy*.) Rather than being defensive, Knowles engaged with these critiques and revised the subtitle to *from pedagogy to andragogy* in the revised edition. While it might appear that he was flip-flopping in his ideas, he, like Kirkpatrick and Mezirow, was a generous scholar open to conversations. The end result has been that even his most ardent detractors have acknowledged that a few of Knowles's ideas and concepts are indeed relevant, notwithstanding weaknesses in his arguments. This has helped keep Knowles front and center in the adult learning field, including the practitioner fields like ASTD.

Following similar discursive practices that have seen Knowles's andragogical concept become central to ASTD's argument, Kirkpatrick's four-level evaluation model has also been solidified in ASTD publications. With the risk of repetition, I, therefore, do not illustrate how the four-level evaluation model has become synonymous with evaluation in ASTD. However, I briefly discuss the model given its continued importance in ASTD publications.

## **Evaluation**

From 1959-60 when he first introduced his evaluation model in ASTD, Donald L. Kirkpatrick has nearly become synonymous with evaluation in the training field. Like Knowles, Kirkpatrick has remained a cornerstone in the train the trainer discourse. In addition to publishing in the ASTD journal, Kirkpatrick has continuously authored chapters in numerous ASTD handbooks starting from the first edition in 1967. Further, in somewhat of a unique approach, ASTD has collected and republished articles (conceptual and empirical) in three different decades authored by Kirkpatrick and other scholars using his models. The first was published in 1975 and included articles between 1960 and 1975, the second had articles between



1976 to 1986, and the last one was published in 1998 and contained articles from 1987 to 1998. Similar to the situation with Knowles, Kirkpatrick has faced persistent criticism mainly from scholars outside of the practitioner literature. The three compendiums, which include empirical articles segregated based on the four levels, seem to be Kirkpatrick's subtle response to these critiques. By providing evidence from empirical research that supports his model, Kirkpatrick has attempted to demonstrate that his model is supported by empirical evidence.

In contrast to Knowles's andragogy being synonymous with adult learning, Jack Phillips is another name referenced in discussions on evaluation, although not with the same frequency (e.g., Phillips & Pulliam, 1998; Phillips et al., 1999a; Phillips et al., 1999b; Phillips et al., 1999c; Phillips & Stone, 1999; Phillips et al., 2003) as Kirkpatrick. One possible reason for the acceptance of Phillips amongst ASTD practitioners could be the close resemblance between his model and Kirkpatrick's model. Phillips's first four levels are almost the same as Kirkpatrick's; the significant difference among the two models is that while Kirkpatrick stops at *level 4—results*, Phillips moves to level 5, where the *return on investment* (ROI) is measured. Another possible reason Phillips's model has been regularly mentioned in the ASTD publications could be Kirkpatrick's support in promoting Phillips's work. For example, Phillips authored three chapters ("ROI: The search for best practices," "Was it the training," and "How much is the training worth?") in Kirkpatrick's 1998 compendium mentioned earlier. Outside of Phillips, other well-known names like Robert O. Brinkerhoff are barely mentioned in the ASTD literature. Also completely missing is any conversation with the broader evaluation field, including the reasonably robust program evaluation approaches in the adult education field.

## Summary

In this chapter, I have discussed how the train the trainer concept has been articulated in the ASTD literature. Assertions about training trainers have been articulated by practitioners, academics, and ASTD office bearers. These authors have used their positional authorities, educational degrees, work experiences, and citational practices to lend validity to their claims. The authors' educational background, work experience, academic roles, and professional standing in ASTD have allowed authors in ASTD to articulate the need to train trainers, train the trainers using publications like *INFO-LINE*, and the need for subject matter experts to master concepts like andragogy. While the articulations in the pre-competency years were tentative, after 1978, ASTD has used competency models to justify the claim that new trainers need to be trained in four broad areas: learning theories, training methods, presentation, and facilitation, and evaluation. Although the literature notes trainers need to learn about learning theories, the train the trainer materials only focus on one small segment of the adult learning field: andragogy. Similarly, discussions on evaluation revolve mostly around Kirkpatrick's four-level model.

While I have quoted numerous authors and also discussed in-depth aspects of Malcolm Knowles's work, the focus was not on individual authors. Rather, following Foucault's (1969/1994) caution about authors, I have focused on the broader contexts that allow the authors to speak in a certain manner. Thus, I have focused on demonstrating that the arguments and mechanics used to *speak* about training trainers, although not immediately visible or explicitly stated, used to solidify articulations about training trainers are products of various discourses in and around the training field. Foucault (1966/1970) has noted that a person's thoughts which appear familiar, bear the stamp of the age that the person lives in. Thus, the arguments for

training trainers have been made within the broader discussions on *research* and *scientific research* in the social sciences.

Foucault (1969/1972) has noted that any truth claim needs to be seen as a function of knowledge produced from certain discourses rather than seeing those truths as transcendental and/or absolutes and knowledge being produced in a linear and logical process by conscious human reasoning. In this chapter, by mobilizing aspects of Foucault's archaeological analytics, I have discussed how *truths* like andragogy in ASTD's train the trainer materials have been manufactured from discourse-specific knowledge constructing apparatuses. Those truths, in turn, continue sustaining the same knowledge constructing apparatuses and discourse in a roundabout manner which in other words means that “`discourse` makes possible disciplines and institutions which, in turn, sustain and distribute those discourses” (Bové, 1990, p. 57). After conducting his archaeological work on *madness*, Foucault (1961/1996) noted that “madness only exists in society, it does not exist outside of the forms of sensibility that isolate it and the forms of repulsion that exclude or capture it” (p. 8). While the various articulations in ASTD literature on training trainers are important and can help SMEs become trainers, the appearance of claims as transcendental *truth* is fallacious. Train the trainer materials, and their claims are not things out in the world waiting to be discovered by humans. Rather, the TTT articulations have been produced as objects of discourse, similar to how objects like *madness* have been produced.

In the next chapter, I discuss the second research question: *What conditions of existence have made these articulations possible?*

## CHAPTER 5

### ARTICULATIONS AND CONDITIONS OF EXISTENCE

*The history of thought means not just the history of ideas or of representations, but also an attempt to answer this question: how is a particular body of knowledge able to be constituted? (Foucault, 1988, p. 256)*

In Chapter 4, I *found* that it is in the pages of *INFO-LINE* (currently known as *T. D. at work*, where T. D. stands for *talent development*), one of American Society of Training Directors' (ASTD) key publications, that ASTD first started formally stipulating what subject matter experts (SMEs) needed to learn to be competent trainers. Since its publication in 1984, *INFO-LINE* has been the authoritative voice of ASTD on training trainers. In the previous chapter, I also discussed how in publications like *INFO-LINE*, scholars like Malcolm Knowles had been mobilized to make articulations about training trainers. However, I did not discuss what has made it possible for articulations about training trainers to be made. Foucault (1969/1972) had noted that only when multiple conditions of existence come together to produce objects of knowledge that particular articulations about the object become sayable. Thus, to explore what conditions of existence have allowed various articulations about training trainers to be made in publications like *INFO-LINE*, in this chapter, I address the second research question: *What conditions of existence have made these articulations possible?*

Given that there are always many constantly changing structures that sustain any field's grids of intelligibility (Foucault, 1966/1970), I have not attempted to locate and identify *all* the structures that support the train the trainer discourse. Rather, I identify and discuss three important conditions: the tension between ASTD, human resource development (HRD), and

psychology around research, the influence of *economic rationalities*, and ubiquity of scientific management and universal claims that have made it possible for the articulations discussed in Chapter 4 to be thought and spoken in ASTD.

Publication of *INFO-LINEs* in the mid-1980s and its continued existence can be understood against events both inside and outside ASTD. I first discuss how *INFO-LINE*, where a large portion of ASTD's TTT literature exists, came into existence at the intersection of concerns on research in ASTD, the influence of the concept – *human resource development* and the I/O psychology field and their direct and indirect impact on ASTD. I discuss how the complex and layered relationships between articulations about research embedded within the broader discussion on HRD in ASTD and the psychology field external to ASTD have provided the conditions for the train the trainer articulations to be made. I start the discussion by providing a brief overview of how the research was historically situated in ASTD and proceed to discuss how the conversations changed after *human resource development* started becoming a concern in ASTD during the 1970s. I argue that the presence of articulations around *human resource development* and the indirect influence from the psychology field have provided some of the "conditions of existence" (Foucault, 1966/1970, p. xiii) for articulations about TTT to emerge, as discussed in Chapter 4. Following this, I then discuss how the influence of *economic rationalities* has allowed the articulation about training trainers to become possible. I have discussed in Chapter 4 how all issues of *INFO-LINEs* by adopting a similar "easy-to-use format" have been presented as "'how-to' booklets" (ASTD, 1984)<sup>67</sup>. As I will discuss later in the chapter, the innocent-looking language, e.g., *easy-to-use format* and *how-to booklets*, in fact, mask the

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<sup>67</sup> These two citations do not have a page number since this quotation appeared in ASTD's advertisement about *INFO-LINE* and ASTD did not number the pages containing the advertisement.

*economic rationalities* that have been deeply ingrained in all aspects of society, including the training field. In the final part of this chapter, I discuss the third condition of existence, the ubiquity of scientific management principles and universal claims, that has allowed the articulations discussed in Chapter 4 to be made and continuously repeated in ASTD.

### **Section 1: Intersection of ASTD, Psychology, and HRD**

In this section, I discuss how the complex and layered relationships between articulations about research embedded within the broader discussion on HRD in ASTD and the psychology field external to ASTD have provided the conditions for the train the trainer articulations to be made. I first provide a brief overview of how the research was historically situated in ASTD, followed by a discussion on the criticisms from the psychology regarding the lack of research-based arguments in ASTD. I then discuss how ASTD's entanglement with *human resource development* that started during the 1970s helped ASTD pushback against the criticism from the psychology field provided some of the "conditions of existence" (Foucault, 1966/1970, p. xiii) for articulations about TTT to emerge as discussed in Chapter 4.

#### **Research in ASTD**

From the 1940s onwards, various authors in ASTD have intermittently made calls for research. For example, in 1948, McGehee, a noted psychologist, noted that based on his knowledge gained "not only on a study of industrial training but also on experience in the field," he was convinced that "with few and infrequent exceptions, little use has been made of a research approach in the development of industrial training programs in America" (p. 3). F. S. "Doc" Laffer (1950), President – ASTD, in his *President's message* introduced the report of ASTD's *National research committee*. Per the President, the Committee had conducted "a comprehensive survey and determined those areas where research is most needed" and results of

this research would help ASTD "have a direction and a comprehensiveness in the years ahead far beyond anything that could have come from a haphazard approach" (p. 1). The research committee<sup>68</sup> subsequently published the report: *Research needed in industrial training: Problems suggested by training directors*, in 1950. The Committee had sent out a letter to all 635 ASTD members in the U.S. and some parts of Canada with a single question, "In your opinion, what is the one problem which you consider most important today as needing research study; the problem you would tackle if you had the time and money to devote to it?" (p. 2). The report discussed the responses received from 283<sup>69</sup> respondents, provided recommendations, and noted the need to explore a mechanism to disseminate the research findings "for those in the training field" (p. 18). Similar patterns of call for conducting and sharing research findings were observed in ASTD in the next few decades<sup>70</sup>.

Heeding the calls for research-based publications, authors in ASTD have been publishing articles which the authors claim are research studies. A commonality of a majority of these studies is that they do not follow what is *normally* expected in research: research questions,

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<sup>68</sup> The research committee consisted of five members: 1) J. H. Crane, Superintendent Mechanical Factory, Gutta Percha and Rubber, Ltd., Toronto, Ontario; 2) Karl D. Klein, Director of Training, Monsanto Chemical Co., St. Louis, Mo.; 3) C. H. Lawshe, Professor of Psychology, Purdue University, Lafayette, Indiana; 4) E. D. Polick, Training Department, Esso Standard Oil Co., Baton Rouge, La.; 5) Lynn A. Emerson, Professor of Industrial and Labor Relations, Cornell University, Ithaca, New York (Chairman of the Committee)

<sup>69</sup> Out of the 283 responses, "236 were representatives of industrial and business concerns; 31 were in schools and colleges concerned with industrial training; and 16 represented training programs in government, professional associations, and the like" (p. 2).

<sup>70</sup> Example: In 1969, Charles C. Denova, Manager Training and Education, Aircraft Division, Hughes Tool Company, Culver City, California authored *Research is not a four-letter word!: The increasing need for research and experimentation in business and industrial training*.

rigorous design, discussions in relation to theory or the broader literature, etc. I have thus labeled these studies as *quasi-empirical*. Although these articles published in ASTD are definitely empirical since instruments like surveys, questionnaires, etc., are used to solicit information, they do not conform to the *normally* expected expectations from the research community influenced by logical positivism (e. g., identifying dependent and independent variables and developing various hypotheses, followed by choosing appropriate research design/methodology/method, and finally carrying appropriate statistical or qualitative analysis). Despite the frequent calls for research-based publications and the subsequent publications of *quasi-empirical* studies in ASTD's journal, ASTD's publications have historically been critiqued for being nonempirical and nontheoretical<sup>71</sup>. This supposedly nonempirical and non-theoretical status of ASTD publications impeded ASTD's efforts to publish authoritative and prescriptive documents, including those focused on training trainers until the late 1970s (when the first competency study was published) and the early 1980s (when the first *INFO-LINE* was published).

### **Non-Theoretical: Criticisms From the Psychology Field**

From 1971 onwards, the *Annual Review of Psychology* has infrequently published reviews on the status of research in training and development in the United States (seven reviews were published between 1971-2009). Campbell<sup>72</sup> (1971) authored the first review and, at the beginning of the review, noted that "by and large, the training and development literature is voluminous, nonempirical, non theoretical, poorly written, and dull. As noted elsewhere, it is fadish to an extreme" (p. 565). While he also identified ASTD's publication *Training and*

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<sup>71</sup> I discuss this point further in the next section.

<sup>72</sup> John P. Campbell, PhD, Professor – Department of Psychology, University of Minnesota, Minneapolis. Campbell noted that "this first review was facilitated in part by funds made available under Office of Naval Research" (p. 565).



*Development Journal* as "the principal journal for practitioners" (p. 566), he does not explicitly claim he was discussing ASTD's Journal when making the above claims. However, his claims are directed at a publication like those of ASTD. At times, the review reads like a complaint list of what is wrong with the training field and its publications regarding content and methodology. As an example, I am presenting a discussion on *evaluation methodology*:

The recurring admonition to "evaluate" training programs is a gross misrepresentation of the empirical question. It strongly implies a dichotomous outcome; to wit, either the program has value, or it doesn't. Such a question is simple-minded, unanswerable, and contributes nothing to practical or scientific understanding. The phrase should be banished. (p. 576)

Campbell (1971) also critiqued the lack of good research designs in training scholarship. A large part of his review is spent pointing out the weakness of research design and lamenting about the supposed shortcomings in designing and conducting training. He is also dismissive of a range of research strategies used, including questionnaires and various types of interviews. While he does not explicitly recommend that researchers follow the research designs of the natural sciences, the intention is there in the review. However, he highlighted the problematic issues of using the scientific method in the social sciences:

*A unique contribution* – One of the most provocative methodological papers of recent years is the attack by [Chris] Argyris on the scientific method as it is used in the social sciences. It should be read and reread by everyone who wants to do empirical research in organizations. The main thrust of his argument is that much of the research in social and organizational psychology creates a Theory X relationship between the researcher and the subjects, with predictable consequences for subject behavior. Research subjects are

simply not the passive creatures we believe them to be, and the only way out of the dilemma is to involve them as full participants in the research effort. This rules out such things as deception research, many questionnaire studies, and many studies requiring control groups. (p. 579)

Concerns and criticisms highlighted by Campbell's appeared in numerous subsequent reviews, including the following review in 1980 when Goldstein continued to lament how "the vast majority of writing in this area is not empirical, theoretical, or thoughtful" (p. 262). Remarkably, the criticisms, some of which have been acerbic, have not been mentioned, acknowledged, or responded to in the ASTD literature. However, given how ASTD publications like *INFO-LINE* and the competency studies in the late 1970s and mid-1980s were developed and published in a format that closely mirrored academic texts, evidence that the criticisms from the psychology field have had an impact on ASTD. A simple example is the use of citational practices in *INFO-LINE*. As discussed in the previous chapter, *INFO-LINE* uses in-text citations, and an extended reference list of materials supposedly used to base their claims. This was a strategic step to counter the claim of being nontheoretical on the part of ASTD. The criticisms from 1971 by I/O psychologists in academic roles, implied as the *true* authorities with regards to the training field, were partially countered by providing *INFO-LINEs* the academic feel.

### **Human Resource Development**

Compared to the earlier decades, which barely had mentions of the term *human resource development* (HRD), the period between the 1970s-1990s saw an explosion of a divergent range of views and arguments on HRD in ASTD publications. Leonard Nadler, a well-respected academic in ASTD circles, published *Developing Human Resources* in 1970. In addition to his book being received and appreciated in academic circles, he also received a similar favorable

response amongst practitioners. In Figure 6, as evidence, I present a favorable book review published in ASTD in 1971.

## Figure 6

### *Nadler's Book Review*

At last someone has put into perspective the classic arguments over definitions and goals of the 'training director' and the 'training profession' Dr Nadler took the bull by the horns. He came up with a beautiful analysis of what we're coming to know as "human resource development," a more comprehensive and sensible term for what most training directors" (there's that term again) do in their jobs. Many writers have alluded to development of the "whole man "This author comes to grips with a 'whole' approach to bringing about change in people be it training education, indoctrination or whatever. But he has carefully avoided allowing his book to become a philosophical treatise or some kind of introspective who am I analysis. Rather, Dr Nadler nicely blends definitions with some pragmatic definitive methodologies that will give the reader real tools with which to work. The book also offers some powerful persuasive points that can be presented to management as a picture of what training" is really all about and where it is headed.

Section 1 offers a fine history of human resource development and presents prospects for the 70's. Section 2 launches into activity areas: employee training, employee education, employee development and non employee development. Section 3 deals with roles of the developer, learning specialists administrators and consultants.

This excellent book is about, and for, the *training professional* who sees himself as a change agent not just a course scheduler.

Reviewer: James E McConnell, Training Director, Houston Natural Gas Company, Houston, Texas

In addition to authoring articles on various issues relating to the training functions and roles like the *training director*, Nadler also published a series of articles in ASTD's journal focusing on HRD after the publication of his 1970 book. These articles focused on different facets of HRD: *Implications of the HRD concept* (1974), *Research: An HRD area* (1979), *HRD- helping managers solve problems* (1981), *Internationalism and HRD* (1981), *Defining the field of human resource development* (1984), *HRD and productivity allied forces* (1988), *International joint ventures and HRD* (1990), etc. These articles, which helped set the conditions for discussion of HRD in ASTD publications both inside and outside the U.S., were

complemented by publications (both of conceptual nature and focused on research) focusing on HRD authored by both academics and practitioners. More importantly, the rise of discussion on HRD in ASTD literature also led to increased research activities in ASTD and helped create the conditions for the publication of *INFO-LINE* in the 1980s.

### **HRD, Research, and ASTD**

In the April 1978 issue, ASTD's General Manager Darius Van Fossen interviewed Leonard Nadler and ASTD National Conference Design Committee chairperson Lee Beckner of the Ogden Service Center. The interviewees discussed two conferences being held in the U.S. Although both conferences were on training and development (ASTD's 34<sup>th</sup> annual national conference and International Federation of Training and Development Organization's 7<sup>th</sup> International Training and Development Conference), the *Journal* published the interviews in an article titled *Two great HRD conferences back-to-back*. This vignette is an example of the conflation of the two terms—training and HRD—in ASTD publications witnessed in the 1980s and 1990s and the increased discussion and solidification of research traditions in ASTD. As I discuss later in the section, discussions on HRD, especially from the academics affiliated with ASTD, influenced how ASTD publications like *INFO-LINE* started becoming research-based. While the ASTD publications do not clearly demonstrate how this conflation started<sup>73</sup>, a strong possible reason could have been the establishment of "an association for HRD academics (the HRD Professors Network of ASTD)" (Chalofsky, 2004, p. 426) in ASTD. This association was also known as PROFNET (Watkins & Marsick, 2016). Although this particular group of scholars "did not seriously begin to promote scholarly work until the Academy for Human Resource

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<sup>73</sup> Since ASTD publications have not discussed what explains the sudden publication of HRD related publication, I have relied on documents from the Academy for Human Resource Development in this section.

Development was formed in 1993" (p. 426), they nonetheless have had a long-lasting impact on ASTD. Watkins and Marsick (2016), two members of PROFNET, have noted that this group "held a pre-conference as part of the ASTD national conference for several years. Papers were given on HRD theory development, research, and curriculum and pedagogical innovations in HRD academic programs" (p. 472). Watkins and Marsick further elaborated PROFNET's role in solidification of research in ASTD:

parallel to these [discussed above] developments, ASTD formed a research committee of scholars, most of whom were university-based, to provide input related to research and the field's professional knowledge base. The Committee advocated for the promotion of research-based approaches to learning and development in the field; supported research sessions at the annual conference; undertook projects; and sponsored an annual dissertation award to signal its valuing of scholarship in practice. (p. 472)

With the work influenced by *PROFNET*, ASTD seems to have found an approach to answer the calls and quest for research in ASTD that had started from the 1940s. As noted by Watkins and Marsick, the ASTD in the 1980s witnessed a range of research-related activities and publication of literature focused and based on research. The publications ranged from publishing advice (e.g., *What editors want: How to get published in HRD* – Toppins et al., 1988), handbook (e.g., *The how-to handbook on doing research in human resource development* – Miller & Barnett, 1986), and conference proceedings with presented papers (e.g., *Studies in training and development: Research papers from the 1978 ASTD national conference*, 1978). In addition to publications similar to the above, research-oriented publications also focused on the then-existing models like the Kirkpatrick evaluation model. While ASTD already had a popular evaluation model – Kirkpatrick's four-level model – Brinkerhoff (1988) introduced his six-stage

evaluation model. In an article titled *An integrated evaluation model for HRD*, Brinkerhoff noted that the "yesterday's evaluation system" (p. 66) represented by Kirkpatrick's model only had a narrow application in the training context, and his model, on the other hand, had a broader HRD focus. While the majority of ASTD publications until the early 1980s were not based on research, the result of the involvement of academics interested in human resource development (HRD) helped ASTD publish research-based publications on a regular basis from the 1980s.

The importance that HRD concepts had on ASTD in the 1980s can also be ascertained by the publication of the updated competency model in 1989; the well-received 1983 competency study *Models for excellence* was updated and republished as *Modes for HRD practice* in 1989 to have a broader acceptance amongst HRD scholars and practitioners. Watkins and Marsick (2016) mentioned that the 1989 updated competency study was used as the base to develop numerous academic programs in the U.S. This particular event, the adoption of ASTD's competency model as the base to academic programs, provided ASTD credibility both inside and outside ASTD. The publication and adoption of the competency model provided ASTD an opportunity to demonstrate that ASTD's literature was no longer non-theoretical or nonempirical as claimed in the psychology literature. More importantly, ASTD *showed* that its publication had the rigor of academic scholarship and was acceptable in academic circles. This, then, implicitly allowed ASTD members, especially the practitioners, to use ASTD publications as authoritative documents in executing various training functions. On the other hand, the broader acceptance of ASTD's research-based publication provided ASTD the impetus to continue publishing research-based artifacts, including the continued publication of *INFO-LINE*, where the majority of articulations about training trainers are made.

As sudden as the appearance of HRD was in the ASTD literature, HRD just as quickly ceased to be the central concept in the mid-1990s period in ASTD parallel to the exit of academics (*PROFNET* members) to another association in 1993. As noted in Chapter 4, in 1991, ASTD had already changed the format of its primary publication "to more practical, "magazine" approach" from the theoretical journal format. The exit of academic professors to form the *Academy of Human Resource Development* (AHRD) in 1993 saw ASTD realign its focus back on practitioners from the early 1990s onwards. While ASTD stopped pretending to be an academic entity in the early 1990s, the work of academics in promoting research in ASTD has been their unacknowledged legacy in ASTD. In the absence of any visible associations in published documents, I cannot definitively claim the *professors' network* (*PROFNET*) (i.e., ASTD members who were also academics professors) were directly responsible for the launch of *INFO-LINE* in 1984 and other research-based publications. Still, it is a fact that *INFO-LINE* was launched around the time of the increased call for research-based publications in ASTD, at the forefront of which were academics, including those from *PROFNET*.

In *The Order of Things*, Foucault (1966/1970) discussed the *discontinuity* of thoughts during the classical (1660-1800) and modern period (1800-1960). He posited that while the *wealth, living beings, and language* were studied in both the periods (they were studied under the fields *areas of analysis of wealth, natural history, and general language* in the *classical period* and under *political economy, biology, and philology* in the *modern period*), the ideas in the modern period were not progressions from the classical period even though the objects appeared similar. Foucault noted *discontinuity* of ideas between the two periods was due to the existence of different *archaeological systems of formation* in the two different epistemes. While I am not claiming that the ASTD has existed in two different epistemes, the articulations in the pre-and

post-competency years are based on two different thought processes. In the pre-competency years, the word of an expert would suffice. In the post-competency years, it is no longer possible for the expert to just make assertions since the claims needed evidence of empirical support. This movement from one mode of articulation to another mode of articulation was the manifestation of *discontinuity* in thought and was *not a linear progression* of thinking, although it may appear logical and natural. It only appears natural to us because, in our milieu, logical positivism has been the epistemological unconsciousness (Steinmetz, 2005) against which *true* knowledge can be produced. Although the speakers made the articulations based on their first-hand experiences in the pre-competency years, the speakers did not provide *evidence* that was considered rigorous and produced following *scientific* research processes. Through the constant work of academics in ASTD and the deeply embedded logical positivism, ASTD publications made significant transformations in how claims were made in the post-competency years. The tension between ASTD, human resource development (HRD), and psychology around research has been one of the conditions of existence of *INFO-LINE* and training the trainer materials. In the next section, I discuss *economic rationalities* as another set of conditions of existence that have made it possible to make particular articulations in ASTD.

## Section 2: Economic Rationalities

In this section, I discuss how the influence of *economic rationalities* has allowed the articulation about training trainers to become possible. I have discussed in Chapter 4 how all issues of *INFO-LINES* by adopting a similar "easy-to-use format" have been presented as "'how-to' booklets" (ASTD, 1984)<sup>74</sup>. As I will discuss later in the chapter, the innocent-looking

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<sup>74</sup> These two citations do not have a page number since this quotation appeared in ASTD's advertisement about *INFO-LINE* and ASTD did not number the pages containing the advertisement.



language, e.g., *easy-to-use format* and *how-to booklets*, in fact, mask the *economic rationalities* that have been deeply ingrained in all aspects of society, including the training field.

The seemingly brief coming together of ASTD and HRD fields during the 1970s-90s have had long-term implications for the training field. Although publications that explicitly refer to human resource development (HRD) have waned from the mid-1990s onwards in the American Society for Training and Development (ASTD) publications, ideas like *human capital*, one of the cornerstones of HRD, have steadfastly remained in ASTD in covert ways. However, even though the search for terms like *human capital* or *human capital theory* in the ASTD archive does not yield many results, in the next section, I discuss how *human capital theory* based on economic rationalities have helped mold ASTD in a particular manner that treats *humans* as just another type of resource available to organizations and privileges the monetary aspects of training interventions.

As noted earlier, organizations use subject matter experts (SMEs) for a variety of reasons. Some of which relate to harnessing the product or process expertise of SMEs (Thompson, 2001); SMEs being in a better position to understand the needs of the trainees (Carnevale et al., 1990); and how SMEs receive higher credibility (Trautman & Klein, 1993). In addition to these non-monetary reasons for using SMEs, organizations use monetary and economic concerns relating to training cost minimization and desire to maximize the returns on training investments to justify using SMEs in training (Martin & Hrivnak, 2009; Noe, 2010). In addition to using economic reasons in making SMEs train, authors have argued for using economic and cost logic in almost all aspects of training. For example, Georgenson and Del Gaizo (1984) argued that using steps recommended by them during needs analysis would improve an organization's profit. In the previous chapter, I discussed Phillips's evaluation model, which purportedly allows

calculation of the return on the investment made on training and development. ASTD's increasing preoccupation with costs was summed in a 1996 article, *The diary of a profession*. In this article celebrating ASTD's 50<sup>th</sup> anniversary, Patricia A. Galagan, Editor of ASTD's flagship publication *Training & Journal*, noted that "bottom-line thinking of the 1980s and 90s ... has been the voice of the profession" (p. 32). Not surprisingly, in 2002, ASTD published an *INFO-LINE* issue titled *Linking training to the bottom line*.

While arguments for cost minimizations and increased returns look commonsensical, they also reflect the entrenched neoliberalism of our societies. From the 1960s onwards, economic thinking has pervaded areas like education which hitherto were not conceptualized under economic logic. With the introduction of human capital theory in ASTD, profit (either through decreased cost or increased efficiency) became the primary reason organizations engaged in training. Not only are subject matter experts used to train for minimizing cost, but the SMEs are also trained using training materials like *INFO-LINE*, which are structured in a manner that allows SMEs to be trained in the shortest possible time, which in turn helps minimize the training cost.

### **Neoliberalism**

While the consternation about cost arising from training functions and desires for increased returns from various training processes seems logical in the capitalist milieu spanning the last few decades, the discussions in ASTD publications on why SMEs need to be used do not readily reveal an epistemic discourse – neoliberalism – that has undergirded our ways of being and enacting in the world. This, however, is not surprising because neoliberalism is not readily identifiable in both work practices and academic scholarship (Bal & Dóci, 2018). However, an accepted *definition* of neoliberalism does not exist, given its supposed *rascal* nature. Per Brenner

et al. (2010), neoliberalism is a "rascal concept – promiscuously pervasive, yet inconsistently defined, empirically imprecise and frequently contested" (p. 184).

Neoliberalism is like the elephant blind people are trying to figure out and a coherent widely accepted definition does not exist. My understanding of neoliberalism comes from the work of Foucault on governmentality. For Foucault, governmentality refers to how humans govern themselves willingly. In neoliberalism, market is the key mechanism for social exchange and the social becomes economic. This means that subjects in neoliberalism willingly engage in economic exchange in the social domain that hitherto was non-economic. Every decision becomes a rational economic decision and cost, and benefits of an option are compared and weighed against another option before a rational decision is made (Schmeichel et al., 2017).

Neoliberalism is not easily identifiable in our everyday lives since it has surreptitiously entered everyday events. Because we have been accustomed to equating much what we do in our lives in monetary terms, it is difficult to think outside the discourse of economic logic. St. Pierre (2002) mentioned

once a discourse becomes ‘normal’ and ‘natural’, it is difficult to think and act outside it.

Within the rules of a discourse, it makes sense to say only certain things. Other statements and other ways of thinking remain unintelligible, outside the realm of possibility. (p. 485)

In addition to the difficulty in thinking and acting outside of a discourse, it is also difficult for subjects to understand and realize how discourse are producing them, since the discourse is constituting the subject and regulates what can be said and thought. Bové (1990) has explained that when a discourse is in play, it “draws attention away from itself, from its disciplinary

operations and effects-with their promises of reward and assistance-and focuses the attention ... on the need "to get the job done" (p. 52).

Foucault (1979/2008) attributed the rise of neoliberalism in the U.S. and other western countries to a conservative response towards government-led initiatives. Neoliberalism, "one of the most influential phenomena in industrialized nations for the last three decades...has had a profound influence on the United States in particular" (Schmeichel et al., 2017, p. 1), and has been argued as an ideology that emphasizes individual economic freedom in a society that can only maximize human well-being (Bal & Dóci, 2018; Fine & Saad-Filho, 2017; Harvey, 2005). Schmeichel et al. (2017) have noted "neoliberalism as a set of related but inconsistent discursive practices that aim at transferring the locus of governance from the state to the individual such that citizens begin to govern themselves according to a market-based rationality" (p. 197). Foucault (1979/2008) noted that neoliberalism repositions a person as a rational "*homo economicus* ... an entrepreneur, an entrepreneur of himself" (p. 226) who governs *himself* by assessing the costs and benefits of alternative options before strategically choosing the optimum option with the highest economic returns; entrepreneurs of the self, base their action on self-interest and utility maximization.

While non-professional trainers in both the pre-WWII and WWII period were required to train, it was for a very particular reason compared to why non-professional trainers have been training in the post-WWII period. Non-professional trainers were needed to train the factory workers in the absence of professional trainers during WWI and WWII who were redirected to the war efforts. However, the increasing use of non-professional trainers after WWII and the subsequent growth in the increase in scholarship focusing on helping non-professional trainers train in the 1960s onwards has occurred with the ascendancy and proliferation of neoliberal

market-based rationality in all walks of life, including education (Schmeichel et al., 2017). The surreptitious entry and solidification of neoliberalism in ASTD are challenging to track and pinpoint. The difficulty in highlighting the existence and working of neoliberalism has been repeatedly highlighted by numerous scholars given how neoliberalism has permeated everyday life (e.g., Adams et al., 2019; Schmeichel et al., 2017; Tan, 2014). The main difficulty lies in the fact that neoliberalism as a discourse has become *normal* and *common* through "practices that systematically form the objects of which they speak" (Foucault, 1969/1972, p. 49). Since neoliberalism is the discourse from which specific training assertions are being made, it is difficult to immediately identify the discursive forces and think of something else outside of how the *thing* was conceptualized and has continued to exist. However, analyses of the ASTD publications reveal some traces of neoliberalism's entry into the training field by using some aspects of *human capital theory*.

### Human Capital Theory

*I propose to treat education as an investment in man and to treat its consequences as a form of capital. Since education becomes a part of the person receiving it, I shall refer to it as human capital.*

*(Theodore Schultz, 1960)*

Human capital theory (HCT) was introduced to the American scholarship in the 1950s through the work of neoclassical economists Theodore Schultz and Gary Becker, who postulated human beings as rational economic beings engaged in utility maximization by investing in education and training<sup>75</sup>. "According to HCT, individuals acquire knowledge and skills called

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<sup>75</sup> Although Adam Smith discussed humans as capital in *Wealth of Nations* in 1776, *human capital* as an accepted economic term and research concern for economist became mainstream only in the mid-twentieth century initially through the work of Nobel Laureate Theodore Schultz. After World War II ended, Employment

human capital through a number of activities, mainly through education and training" (Buyruk, 2020, p. 64). As early as 1964, George S. Odiorne<sup>76</sup>, in an ASTD article, *The need for an economic approach to training: A case for capital budgeting for investments in human capital*, introduced the work of Professor Theodore Schultz – President of the American Economic

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Act of 1946 was enacted to ensure the U.S. did not enter another period of economic depression. For the first time in the U.S. history, the act provided the Federal Government the responsibility of ensuring the country's overall economic health and also established the Council of Economic Advisers to advise the President in economic matters. Guided by the Act, economists who had initially focused on economic stability of the U.S. economy subsequently started to focus more on the overall economic growth of the American economy. The change in focus on economic growth was to understand and implement economic policies that would help the U.S. match and ultimately overtake the economic growth in the Soviet Union and restore United States' global superiority. As economists started studying different dimensions of economic growth, a *gap* in their understanding was revealed. The historical analysis of economic growth revealed that traditional concepts like *capital accumulation* could not explain the reasons for the economic growth in U.S. It was noted the investment in traditional resources like capital, labor, land, and management did not explain the gap between investment and actual economic growth, and for a period, this unmeasured gap was known as the *residual factor*. Theodore Schultz, a noted Agriculture Economist by the 1950s, was one of the numerous economists vexed by this issue. He subsequently theorized that the residual factor represented the investment in the *human capital* and that *investment* in this new form of capital by means of education and training could lead to higher economic growth. His ideas influenced a range of scholars from different fields to carry forward research on human capital (e.g., Nobel Laureate and noted economist Gary Becker and other scholars like Jacob Mincer) and also integrate the concept into federal policies. Walter Heller, Chairman of the Council of Economic Advisers to the U.S. President, was deeply influenced by Schultz's ideas on human capital and became the visible conduit to take an esoteric economic concept into the heart of Federal policies on education and "encouraged politicians and policymakers to view education through the lens of human capital theory, in which education was a means to achieve national economic goals" (Holden & Biddle, 2017, p. 553). Although in archeological studies, it is not usual to credit a single person like Schultz or Heller as *the* transformative agent, I have none-the-less followed this strategy here since Foucault also followed such strategic ploys in his work. For example, in *The Order of Things*, he credited the "genius of a single man [French natural scientist Jean-Baptiste de Monet de Lamarck] for the transformation of thought from the category of taxinomia to that of organic structure" (Ärnason, 2018, p. 20).

<sup>76</sup> George S. Odierno, PhD - Director of the Bureau of Industrial Relations and Professor of Industrial Relations at The University of Michigan. His experience includes positions as Assistant Director of Personnel Administration at General Mills, Inc.; Personnel Division Manager of the American Management Association; and as a manager in the manufacturing division of American Can Company.

Association relating to human capital. In the article, Odierno used Schultz's arguments on human capital to argue for an economic approach to training. The concept of *human capital* and its supposed importance for the training field was furthered in ASTD through the work of Anthony P. Carnevale<sup>77</sup> during the 1980s and 1990s. Carnevale, a noted economist with national recognition and senior federal appointments by both the Democratic and Republican parties, published a series of books on behalf of ASTD. His 1983 book *Human capital: A high yield corporate investment* discussed the relevancy and crucial role of accepting the premise of *human capital* and argued for the need to handle human resources budget as capital budget to achieve success. Echoing the sentiments of other economists, Carnevale eloquently provided the human capital framework in a way that readers in ASTD could make sense of. His work helped ASTD internalize that the long-term economic growth and success were contingent on the quality of human resources, and the training and education could help improve the quality of human

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<sup>77</sup> Anthony P. Carnevale, PhD, since 2008 has served as research Professor and Director of the Georgetown University Center on Education and the Workforce. Between 1996 and 2006, Dr. Carnevale served as Vice President for Public Leadership at the Educational Testing Service (ETS). While at ETS, Dr. Carnevale was appointed by President George Bush to serve on the White House Commission on Technology and Adult Education. Before joining ETS, Dr. Carnevale was Director of Human Resource and Employment Studies at the Committee for Economic Development (CED), the nation's oldest business-sponsored policy research organization. While at CED, Carnevale was appointed by President Clinton to Chair the National Commission on Employment Policy. Dr. Carnevale was the founder and President of the Institute for Workplace Learning (IWL) between 1983 and 1993. The IWL worked directly with consortia of private companies to develop high performance work systems and to develop more effective work and training systems. IWL was an applied research center affiliated with the American Society for Training and Development (ASTD) – a professional association for human resource specialists in private companies. During these years, he was the *Chief Economist* for ASTD. While at the IWL, Dr. Carnevale was appointed by President Reagan to chair the human resources subcommittee on the White House Commission on Productivity between 1982 and 1984. In August of 1993, President Clinton appointed Carnevale as chair of the National Commission for Employment Policy, an independent federal agency charged with identifying employment-related education and training needs of the nation, recommending policy goals, and assessing how current policies and programs meet them.

resources. In 1986, Carnevale led a group of researchers, "funded by a grant from the U.S. Department of Labor, embarked on a 30-month landmark study of training practices among American employers" (Sonnesyn, 1990, p. 116) and published three books in 1990: *Workplace basics: the essential skills employers want*, *Training in America: the organization and strategic role of training*, *Training the technical workforce*. These books furthered the discussion on why organizations needed to understand and engage in training based on the *human capital* concept. Per Galagan (1996),<sup>78</sup> his next book in 1991, *America and the new economy* established "the economic link between learning and performance." Discussions around human capital by scholars like Carnevale helped organizations re-conceptualize training *costs* as an *investment*, no longer a necessary evil but a *tool* to increase profit. Like machines needing repairs and up-gradation to help organizations remain efficient, training became another tool to help organizations become more efficient and earn increased profit by investing in people.

While the work of Carnevale and his associates overtly introduced tenets of HCT in the ASTD literature and impacted the ASTD literature, Leonard Nadler's role in developing the training professional and trainer in the mold of *entrepreneur of himself* is not immediately visible. As noted earlier, it is commonly accepted that Nadler introduced the term *human resource development* to ASTD's lexicon. While many HRD scholars have agreed that *human capital theory* is one of the foundational theories of the HRD, such assertions are neither visible in the ASTD handbooks where the history of training is frequently discussed nor in ASTD's journal or in *INFO-LINE* issues. Further, the problematic issue of equating humans to buildings and machinery is also missing from in aforementioned ASTD publications. The entry of *humans* already profoundly imbricated in economic rationality through the work of established and

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<sup>78</sup> Editor, *Training & Development*, ASTD's flagship publication.



widely cited academics like Nadler and Carnevale is readily accepted. As discussed earlier, an obscure economic concept became a common term in the social sciences primarily through the adoption of the term in Federal policies. Since the term entered the Federal lexicon around the time when tensions with the Communist countries were at a peak and helped provide *logic* to the U.S. Government to ensure continued economic growth, there was limited resistance in practitioner fields like ASTD.

When called upon to attend a train the trainer program and subsequently train others, a subject matter expert typically accepts the invitation. While there might be mitigating circumstances for the SME to decline the offer, most SMEs engage in the default *entrepreneur of himself* mode and accept that position. Since this mode of being, i.e., taking on additional responsibility outside of one's core expertise can translate into utility maximization, the *rational economic human* manifested through the human capital theory understands the opportunity to gain training skills to increase their value by adding another commodity. Further, since everything, including labor, is commodified in neoliberalism (Harvey, 2005), the newly acquired training skills, as a commodity, can bring in higher economic returns in the free market. Lest it is forgotten, the *human* in neoclassical economics is always a utility maximizer (Tan, 2014). What that means is that the *human's* "life activities are acts of self-investment for the purposes of its employability, it is a mode of existence that identifies life with work" (Miller, 2018, p. 86). On the other hand, if the SME resists learning the new skills, the SME can potentially be labeled as a problematic employee, lowering the SMEs overall commodity value. This occurs since anything except engaging as an *entrepreneur is* not seen as the "natural state of affairs" (Bal & Dóci, 2018, p. 538) in neoliberalism. The *rational economic human* will always engage in activities that maximize the human's utility value.

In this section, I have discussed the influence of *economic rationalities* as another set of conditions of existence that have made it possible for certain articulations on training trainers in ASTD publications to be made. In the next section, I discuss how discourses of scientific management, certainty, and universal claims have been another set of the conditions of existence for articulations on training trainers.

### **Section 3: Scientific Management, Certainty, and Universal Claims**

#### **Scientific Management**

Although ASTD's different train the trainer documents (e.g., *INFO-LINE*) do not explicitly mention that they follow a similar format or discuss the same content, the materials are almost identical. One possible way to understand this curious issue is by acknowledging the presence of books like *ASTD's Ultimate train-the-trainer: A complete guide to training success* published in 2009. This book, authored by Elaine Biech<sup>79</sup>, is written for trainers who design and train subject matter experts on how to train, i.e., in 286 pages of the guide, ASTD teaches how an expert trainer should design a train the trainer program. From 1984 onwards, ASTD has produced literature like *INFO-LINE* that is used to train novice trainers and has produced literature that trains seasoned trainers on the intricacies of training other trainers (e.g., Biech,

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<sup>79</sup> Elaine Biech, president of ebb Associates Inc, a strategic implementation, leadership development, and experiential learning consulting firm, has been in the field for more than 30 years helping organizations work through large-scale change. She has presented at dozens of national and international conferences including 34 consecutive ATD National Conferences. She has been featured in publications such as the Wall Street Journal, Harvard Management Update, Investor's Business Daily, and Fortune. She is the author and editor of 86 books, receiving national awards for two of them. Among her extensive body of published work are many ATD titles, including the flagship publication, *The ASTD Handbook: The Definitive Reference for Training and Development* (2014). She wrote the first ASTD Training Certificate Program and has designed five additional certificate programs.

2014). Another explanation of this phenomenon (i.e., similarity across train the trainer materials worldwide) can be excised from Taylor's (1911) *Principles of Scientific Management*.

One of Taylor's core principles relates to *determining one best way to perform a job*. While his concepts (e.g., standardizing, systemizing, breaking large jobs into small manageable components) were based on industrial work, the principles have been coopted in organizations other than manufacturing. Although Taylorian scientific management has had its fair share of criticism, it is still alive and prospering (Witzel & Warner, 2015). In fact, any manner of organizational setup or organizational work is simply inconceivable without applying Taylor's numerous assertions.

The train the trainer materials exhibit the unmistakable stamp of Taylorian thinking. For reasons not explicitly stated, publications like *Basic training for the trainer*, *Teaching SMEs to train*, and *ASTD's ultimate train-the-trainer* have the same content and almost the same order of that content, as shown in Table 12.

While ASTD uses results from the competency models to justify why the train the trainer materials have the content they have, ASTD does not explicitly declare that training trainers in the manner that ASTD prescribes is the best way to train. However, by publishing the train the trainer publications with almost the same content with similar outlines for over thirty years which have been used as templates to design and deliver train the trainer worldwide, ASTD has determined there is one best way to train new trainers. Further, by constantly cross-referencing their work across numerous ASTD publications, ASTD has standardized what needs to be spoken and how it needs to be expressed. For example, the 2009 *ASTD's ultimate train-the-trainer* guide has countless toolkits, including guidelines like using 6X6 PowerPoint slides (i.e., using a maximum of six lines in a slide and ensuring each line has a maximum of six words),

classroom set up, talking points in specific situations, etc. In my personal experience, I have witnessed this guide being used by a variety of organizations around the world. Further, ASTD's train the trainer documents also break the content into small manageable chunks of information, reflective of the Taylorian concept of breaking large jobs into small manageable components. One reason the train the trainer materials have continued to hold on to ideas from the 1930s is that Taylor's ideas help improve efficiency by allowing the subject matter experts to quickly learn training and use the learned skills in their organizations. Taylorian ideas help improve the *economic utility* of both the subject matter expert and the organization. In other words, neoliberal practices continue to be strengthened by how train the trainer materials are written and internalized. The train the trainer materials produce *neoliberal trainers* who train in an instrumental but efficient manner and continue to sustain the same neoliberal system that produced them.

### **Certainty and Universal Claims**

When an organization nominates a subject matter expert (SME) to a train the trainer (TTT) program, the organization knows what the SME will learn and how the SME will ideally perform in the training hall after attending the TTT program. Thus, an organization can predict the performance (at least it assumes it can predict) based on how TTT programs like those of ASTD are constructed, structured, and executed. TTT materials are built in a way that allows organizations to understand that the unpredictability of trainer performance can be eliminated, and that the organization does not waste their precious economic capital by sending SMEs to TTT programs. While the desire to eradicate unpredictability comes as a normal reaction at present, Foucault (1970) noted that eliminating unpredictability is a key characteristic of the modern episteme. The modernity project came into existence by rejecting the uncertainty

embedded in the belief systems of the 17<sup>th</sup> century and by arguing for rational scientific approaches for certainty. Seeking certainty and the desire to eliminate unpredictability has been an ongoing epistemic pillar of modernity after Descartes and remains one of modernity's historical legacy<sup>80</sup>. Consequently, in modernity, knowledge is structured to sustain order and suppress randomness (Townley, 2002).

ASTD introduction to its 2016 *Train the trainer Volume 1: Foundations and delivery: The basics to becoming a successful trainer* contain the following statements:

An excellent starter pack for a training department of any size, volume 1, Foundations and Delivery: *The Basics to Becoming a Successful Trainer, is the ultimate how-to manual for training new trainers....* From designing learner-centered instruction to managing difficult participants, *this volume covers core competencies that all trainers must master to deliver top training experiences.* (www.td.org; emphasis added)

Train the trainer publications from ASTD regularly use phrases like *ultimate how-to manual* and *competencies that all trainers must master* across its publications. By constantly using such rhetoric, ASTD constantly reminds subject matter experts (SMEs) that to succeed as a trainer, certain *things* need to be mastered that ASTD has decided subject matter experts need to master to be competent trainers. In other words, the SMEs are being *disciplined*. Their thoughts and how they will enact themselves in training halls are being disciplined. The trainer that gets produced through the train the trainer materials are molded as *docile* trainers. Foucault (1975/1991) has noted that standards are used to make minds and bodies docile and ultimately reinforce the

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<sup>80</sup> In his manuscript '*Discourse on the method for conducting one's reason well and for seeking truth in the sciences*', Rene Descartes rejected the contingent, that which could be doubted by a rational mind based on "clear logic of mathematics, with its ideal of objectivity and its ability to represent truth in numbers" (St. Pierre, 2012, p. 486).

existing social order. TTT materials help subject matter experts continuously practice *entrepreneurship of the self* by conveying that subject matter experts can become successful trainers *if* they religiously follow the TTT materials. The TTT materials then help organizations make their employees multi-taskers by making them trainers and surreptitious contributors to the organization's bottom line. Additionally, as noted in Chapter 4, sentences like "as a trainer, you [participant in the train the trainer program] must possess four basic areas of skills and knowledge: 1. learning theory 2. training methods 3. presentation and facilitation 4. evaluation" (ASTD, 2016, p. 3) are used to introduce and train the SMEs. Phrases and sentences like the above are projected in TTT publications with the air of finality and come across as universal truths. Universal, since the same materials are used to train SMEs without considering any SME's background like work history and experience, geographic location, cultural background, etc. While ASTD does not claim that the TTT materials are universal, they also do not reject the premise. Bové (1990) noted that Foucauldian usage of discourse makes it clear that any truth claim can be seen as a function of knowledge produced from certain discourses rather than seeing truths as transcendental and/or absolutes and knowledge being produced in a linear and logical process by conscious human reasoning. Per Bové, knowledge, as presented in textbooks, journal articles, and/or commonsensically known, is not the result of linear progress in human thoughts but are products of specific discourses in play. By constantly repeating the same information through multiple publications, ASTD's claim on training trainers has been reified and appear as universal truths. Since the finality of the words about the supposed effectiveness of the TTT is uncontested in ASTD's publications like the *Ultimate train-the-trainer*, the words appear and function as universal truths. The pursuit of rational *universal claims, values, and*

*truths* have been key characteristics of modernity from the 17<sup>th</sup> century. ASTD's TTT literature is thus another manifestation of modernity.

### Summary

In the previous chapter, I discussed how articulations about training trainers had been made in ASTD publications like *INFO-LINE*. Since it is only when multiple conditions of existence come together that objects of knowledge are produced (Foucault, 1969/1972), in this chapter, I have explored what conditions of existence have allowed various articulations about training trainers to be made in ASTD. I have identified and discussed three crucial conditions: the tension between ASTD, human resource development (HRD), and psychology around research; the influence of *economic rationalities*; and ubiquity of scientific management and universal claims that have made it possible for the articulations on training trainers to be made in ASTD.

Fields like psychology have historically critiqued ASTD for not being research-oriented or theoretical. While ASTD has not directly responded to this criticism, the involvement of academics interested in human resource development saw ASTD, from 1978 onwards, publish a series of research-based publications like competency studies and *INFO-LINE. Modes for HRD practice*, a competency study published in 1989, was used by academic programs across the U.S. to design various HRD academic programs and consequently provided credibility to ASTD publications amongst the broader ASTD membership base. Although a large number of academics who primarily used the 1989 competency model ultimately left ASTD in 1993 to form their own association focused on HRD, the traces of research traditions left behind has served as one of the conditions of existence that has allowed various *authoritative* articulations about training trainers to be made in ASTD.

From the 1960s onwards, the U.S. economy has witnessed increased discussion on human capital theory. In contrast to the traditional understanding of capital, labor, land, and management as economic resources, from the 1960s onwards, humans have also been considered resources. Although *human capital* was an obscure economic concept initially, it quickly became the *logic* that pervaded areas like education which hitherto were not conceptualized under economic rationalities. The human capital theory posits that human beings are rational and will engage in utility maximization by investing in education and training. Through the arguments made by economists like Anthony Carnevale and academics like Leonard Nadler, human capital and the *economic rationalities* entered and solidified in ASTD's publication and became another set of conditions of existence that has made it possible for articulation about training trainers to be made in ASTD.

The ubiquity of scientific management principles and universal claims in ASTD publications like *INFO-LINE* have been the third set of conditions of existence that have allowed authors in ASTD to *speak* about training trainers. Publications like *INFO-LINE* exhibit the unmistakable stamp of Cartesian and Taylorian thinking. One of Descartes's key concerns was the rejection of the contingent and doubt when striving for truth. By clearly stipulating what the subject matter experts will learn and how they will learn, the training materials remove any unambiguity on how the subject matter experts *need* to train after the training. The train the trainer documents declare that *all* trainers need to train in a particular manner irrespective of the subject matter expert's background. This approach is a manifestation of one of Taylor's core principles: *determining one best way to perform a job*. Publications like *INFO-LINE* have the same content and almost the same order of that content, which again reflects other Taylorian



principles like standardizing, systemizing, and breaking large jobs into small manageable components.

In this chapter, I have discussed the various conditions of existence that have allowed articulations about training trainers to be made. In the next chapter, I discuss my overall conclusions and implications of the study.

## CHAPTER 6

### CODA

I am using this final chapter to summarize the work entailed in this dissertation, discuss the implications of my work, and my reflections on engaging in this project. I started this dissertation with incredulity on the uniformity of train the trainer literature across the world. Having understood, from both first-hand training experience and exposure to the American Society of Training Directors (ASTD) literature, that assertions made within the pages of various ASTD publications have impacted the global train the trainer literature, this study focused on exploring how train the trainer literature have been articulated in ASTD and what conditions of existence have made those articulations possible. A review of the literature showed that while there have been persistent calls for subject matter experts (SMEs) to train and how SMEs themselves need to be trained on training others, there is a limited discussion that focuses on the train the trainer materials. Even rarer is the discussion on how the train the trainer materials are constructed. This dissertation has thus focused on exploring this gap.

However, I was not interested in interpreting what I was reading to *find* the hidden behind the speakers' intentions (Gutting, 2005). I aimed to explore how various objects and concepts focused on training trainers were discursively produced and what structures enabled those productions. This research project and the research questions discussed below became only possible because I had attempted to *think* with Michel Foucault (Jackson & Mazzei, 2012). *In* my case with Foucauldian ideas, thinking with theory allowed me to put Foucault's archaeological analytic (Foucault, 1969/1972) to work in interrogating the seemingly innocent and mundane

concept, *training the trainers*. Foucault's archaeological analytic heavily influenced both the theoretical and ~~methodological~~ concerns in this dissertation. Given the impossibility of finding Foucauldian ~~methodological steps~~ since none exist, some strategies presented in the *Archaeology of Knowledge* were strategically employed to structure the study and make sense of the voluminous ~~data~~.

In Chapter 4, I answered the first research question: *In what ways has the train the trainer (TTT) concept been articulated in the ASTD literature?* To obtain answers to this question, I formulated additional questions based on Foucault's rules discussed in *Archaeology of Knowledge* and used those questions to explore ASTD publications focused on training trainers. Per Foucault (1969/1972), “surfaces of emergence” (p. 41) are the social locations where objects of a discourse are first discussed, designated, and acted upon. Analysis of ASTD shows that the knowledge regarding training emerged from both the shopfloors of industries and the training halls in white-collar environments. Foucault (1969/1972) explained that objects come into existence on certain surfaces from utterances of authoritative figures. The analyses showed that assertions about training trainers in ASTD had been articulated by practitioners, academics, and ASTD office bearers. Foucault (1969/1972) noted that something is sayable only under particular “grids of specification” (p. 42). The articulations on training trainers became possible by classifying and organizing various training objects in multiple ways and relying on concepts like *scientific research* located in the broader social science domain. The author’s organizational positions and roles, educational degrees, and work experiences have been implicitly used as the *authority to speak* about different aspects of training trainers. Foucault (1969/1972) noted that something becomes *sayable* and coherent only when relations exist between different objects or in the presence and absence of certain concepts. The conversations on training the trainer

occurred with the broader discussions on the need to develop and improve the skills of training personnel in general. Statements about trainers and training the trainer depended on the articulations about training directors and the training function in general. Foucault (1969/1972) has noted that during the process of discursive practices coming into existence and sustaining themselves, statements are taken up from elsewhere but become an accepted part of a discourse (*field of presence*) and that statements from other discourses are used analogically, as models, or in some legitimizing function in a discourse (*field of concomitance*). ASTD has borrowed *citational practices* from the broader academic field and used the citational techniques to provide publications such as *INFO-LINEs* credibility.

ASTD has used publications like *INFO-LINE* to make articulations on training trainers and used *citational practices*, including calls for research borrowed from the broader academic field to make *INFO-LINE* credible. Publications like *INFO-LINE* imply concepts like andragogy and the four-level evaluation model are some of the foundational pillars around which the TTT texts are structured. However, a review of Knowles' and Kirkpatrick's work over the years showed that they themselves acknowledged their work as anything but foundational. Both Knowles and Kirkpatrick revised their original assumptions numerous times in their lifetimes, but those changes are not reflected in the literature, which continues to repeat superficial information mostly. In Kirkpatrick's case, the revision has continued even after his death through the work of his son and daughter-in-law, who now run the Kirkpatrick organization, which offers programs globally. Both Knowles and Kirkpatrick did not claim to be foundational, but fields like training seem to be interpreting their knowledge claims as foundational. At the most, their knowledge claims are contingent foundations.

In Chapter 5, I answered the second research question: *What conditions of existence have made these articulations possible?* I argued three conditions of existence: the tension between ASTD, human resource development (HRD), and psychology around research; the influence of economic rationalities; and ubiquity of scientific management and universal claims have made it possible for the articulations on training trainers to be made in ASTD. Findings indicate the pervasive influence of market-based rationality and the modern episteme in ASTD's train the trainer literature. Train the trainer documents in the U.S. that appear normal and commonsensical have been produced at the intersection of neoliberalism and scientific management. Tenets and traces of positivism exist everywhere in ASTD's train the trainer literature.

Despite decades of persistent criticisms from academic fields like human resource development and I/O psychology, ASTD refuses to respond to criticisms of its publications, continues to grow, and does its own thing! ASTD has relied on theoretically and empirically suspect concepts [per *academics*] to construct train the trainer literature by relying on circular self-referential and self-legitimizing strategies. Concepts from the train the trainer literature are written about in a voluminous manner and seemingly appear everywhere: journal articles, handbooks, certificate programs, textbooks, flyers, practitioner magazines, competency standards, and government documents. A *hidden* discursive circularity had made it possible for various objects and concepts to come alive and sustain themselves in ASTD. Since numerous concepts are written and discussed on a voluminous scale in a circular manner, it might appear that the train the trainer concepts have always existed on some foundations for first-time readers. However, none of the train the trainer concepts are transcendental. Instead, these are all human-constructed concepts of recent origin.

Doing its own thing has meant many different things to ASTD in the last 78 years. From 2014, it has not even been called ASTD. I decided to use ASTD in this dissertation to make it convenient for me to write and convenient for the reader—one less acronym to be worried about. In 76 years, ASTD's primary publication has been variously known as *Industrial Training News* (1945), *Journal of Industrial Training* (1947), *Journal of the American Society of Training Directors* (1954), *Training Directors Journal* (1963), *Training and Development Journal* (1966), *Training and Development* (1991), *T+D* (2001) and *TD* (2014). The association has had three different names. From catering to a small group of training directors in 1943, it has grown to be an institution with global connections. From having focused on the industrial training interests of U.S. organizations in the early days to its current form, where it neither has *America or training and development* in its name and focuses on *talent development* as the Association for Talent Development, much has changed. The name changes have also led to the name-changing of its ever-popular competency models. The most recent model published in 2019 was named *Talent Development Capability Model*, with the phrase *Capability Model* being trademarked! This then begs the question: does it continue to represent the profession of training and development in its current form? The frequent name changes of its flagship publication, refocusing in newer areas like HRD and currently on Talent Development, followed by the association's strategic name change, might mean a few things. First, it could mean the association is acutely aware of the impending and ongoing changes in the organizational learning domain on a real-time basis and has refocused on the next big thing. This does not sound implausible given that the association identifies with its practitioners. It might also mean ASTD is in a state of continued existential angst. It has formed, reformed, and reformed into something other than what it was before to continue being relevant. It does not mean anything from the old has not continued in the new.

While there are continuities, there have been discontinuities in its history, and there is no teleological progress in play. Further, the existential angst is also reflected in the impermanence or fragility of the training function. In a hyper-capitalist society where everything is measured against the bottom line, funding of the training function is one of the first *overheads* to be cut during turbulent financial scenarios including downsizing. Thus, to defend one's turf and continue remain relevant, training professionals or those responsible for training and development, strategically use the quest for certainty, professionalism, and credibility through research. The training and development discourse has thus resorted to practices seeped in economic rationalities (e.g., reliance on managers as facilitators of learning and on learners to learn on their own) to make the training and development *overheads* worthwhile economic investment and resist the impermanence or fragility of the training function.

During the analyses, I divided my ~~data~~ into two periods: the pre-competency and competency periods. A significant reason for this demarcation was the publication of ASTD's first competency study in 1978. Before 1978, whatever was *spoken in* ASTD generally appeared as opinions of individual speakers since ASTD did not have any formalized research-based foundation to structure claims on training. However, after 1978, influenced by the work of members who also were academics with interests in the broader area of human resource development, ASTD published a series of publications based on research. This strategic action on the part of ASTD allowed individual speakers to make authoritative claims and not simply opinions. Further, given that these periods are arbitrary, there are multiple spillovers of ideas from one period to the next. For example, conversations about the need for competency started in the first period and then received continued traction over the next period. Some concepts like *human capital* were briefly introduced in one period, get solidified, and are referred to as

memories in the next period but influenced almost everything written on the train the trainer topic in ASTD. Some concepts like andragogy were non-existent in one period, but within a few years in the next period became one of the central *foundations* of the train the trainer literature and influenced what could be spoken about training trainers. On the other hand, some concepts moved the other way: from being a key concern in the first period, the *training director* received almost no discussion in the later years. Foucault (1966/1970) noted that discontinuities occurred when “things are no longer perceived, described, expressed, characterized, classified, and known in the same way” (p. 235). Discontinuities reveal the fallibility of discourses and momentarily lets the reader appreciate the impermanence of the discourse, and reminds us that we can always do something else or change what is being done.

### **Implications for Theory**

Dear Fellow Academic,

I am glad that you are interested in learning more about the train the trainer literature. As you might know, my dissertation has not been of the "traditional" type. I did not collect data from respondents through interviews, focus groups, survey instruments, observations, or by participating in action research. My ~~data~~, the archive I studied, included various publications that ASTD has published over many decades. The purpose of my dissertation was not to reject or destroy either the T&D field or the train the trainer's literature with its related artifacts. It was an attempt to open up space in contemporary writings of T&D such that trainer, train the trainer artifacts, and training practice could be thought of, articulated, and done differently in the future. Based on my experiences doing the study and reading, reading, and more reading, I have some reflections to share that might or might not help start thinking about the training subject matter experts differently.



To start, I would like to caution you in assuming that the training documents are stable in nature and provide a constant and uniform meaning. Mobilizing Foucauldian thinking has allowed me to identify contradictions in the seemingly stable arguments and thinking in training documents. I again use Malcolm Knowles as an example. Recognized as a humanist, his oeuvre is focused on continuously reminding educators to treat adults as adults in learning situations. However, his work has been instrumentalized and used in a behaviorist manner in the TTT literature. In the train the trainer programs, new trainers learn that they need to treat their future trainees as adults and engage in actions seeped in humanistic philosophy. However, this information is *taught* to the prospective trainer in a highly controlled and compartmentalized manner with humanisms only in the book they are reading. So, the training itself is not humanist. Another example that became clearer the more I dived into the ASTD archives is that ASTD authors discuss the importance of rigorous research and make calls for the same. The articles that make these classes themselves do not provide evidence of engaging in rigorous research in making their claims. Although ASTD looks stable and robust from afar, a closer look makes visible contradictions in its statements and practices. This realization then opens up spaces to do something new. What that new can be or should be, I cannot prescribe. However, with the risk of being prescriptive, one suggestion could be for you to search for ways that translate Knowles's humanistic ideas into actual practices in the training situations.

Second, I would like to draw your attention to the fact that this study has made it clear that a subject matter expert becomes a trainer at the intersection of overlapping discourses like scientific management and neoliberalism. Given that discourses regulate what and how subjects can speak, immediately moving away from the stifling discursive practice embedded in neoliberalism is impossible. However, in your work, you can try to discuss the implications of

concepts like human capital theory when discussing trainers. I am not asking you to engage in poststructural theorization; the request is just to be mindful and possibly engage in micro-resistances against dangerous and problematic discursive practices like neoliberalism that construct us.

Third, if you are an ASTD author or an academic, or somebody in a position to influence what is written about trainers in ASTD, please do strive to make certain changes in the *TD at work*. It has pained me to see that most of your publications are context-blind. By the look of it, it looks like you are saying *TD at work* will work in whichever context. A nuanced discussion of what can be done differently to address differences while training in the training hall, while collecting data for needs analysis, designing training for people with different disabilities, etc., will be much appreciated. Further, please do clarify that adult learning does not equal andragogy; andragogy cannot be explained in few sentences. While I understand your limitations, you can still do better than just ignoring every other adult theory. There are a wide variety of texts that discuss the different types of principles, theories, and traditions of adult learning which can be of value to you. Finally, realizing that all we read in the texts are human construction should be liberating. It was liberating to me. This does not mean you immediately stop doing what you are doing. Don't throw the baby out with the water. Be cognizant that we don't need to accept what is written in the texts blindly. Remember the story I told about Knowles and Kirkpatrick. Both were more than happy to accommodate criticisms. Their work has become richer and, to a degree, more rigorous because of people like you and me, who did not hesitate to voice concerns about their work. More often than not, a scholar would be more than happy to discuss the issues you have highlighted.

Yours truly, Ajit

### Implications for Practice

Dear Subject Matter Expert,

I am glad that you are embarking on this exciting journey to become a non-professional trainer. The journey ahead is challenging but very rewarding. As a subject matter expert who has undergone multiple train the trainer course in different countries, I have two thoughts to share with you.

First, I recommend that you not use Malcolm Knowles as a *Trojan Horse* to get into the training hall and then completely forget what his ideas stand for. Like the work of many theorists, Knowles's ideas have also been challenged for over five decades. Irrespective of what you might read, it might be better if you thought of his propositions as working principles rather than empirically tested theory. If you intend to use concepts like andragogy, do read a bit on his original work.

Second, it might be helpful to remember that the booklets you have with you on training the trainer can be very seducing. They are easy to read and definitely useful. However, remember elephants have two sets of teeth: the outer shining tusks and the inner chewing teeth. While the TTT materials you have mastered are more than the ornamental tusk, since you can start training on those documents, they are just the tip of what can be done and what needs to be done. Remember, what you will learn in the next 3 or 5 days in the training hall consists of snapshots of materials, many of which can be only partially mastered even if you did a doctorate in that particular topic. Mind you I am not scaring you. It is just that these are commercial products and therefore have the bare minimum information needed. If you still want to stick with your materials, I request you to thoroughly review the reference list and read the books and other

listed publications. Having said that, many of the publications are very useful in actual training hall situations. Just be alert to modify things if they don't plan, as mentioned in the booklet.

Yours truly, Ajit

### **Delimitations**

Since I am taking a particular *cut* of the literature, the *story* in the dissertation is just one narrative that can be told of the ASTD archive. There are definitely more stories that can be said differently, leading to a different but nuanced understanding of the field. A significant limitation of the study was the inability to access the archives of ASTD and the National Archives, as I had envisioned at the start of this dissertation. Further, it was impossible to identify everything that ASTD has published outside of its journals, even after spending large sums as membership fees and access to ASTD's digitalized records. Even when identified, numerous artifacts could not be located through resources like UGA's library network, ERIC, archive.org, or online booksellers. Further, ASTD's association with different Governmental agencies and ASTD's considerable international outreach was also not explored in the study.

### **Recommendations for Future Research**

For those who are interested in continuing *post* scholarship and analysis, I offer the following recommendations:

- Genealogical investigations that trace the lines of descent from ASTD's present to the events in ASTD's past that made the existence of certain truths about training and development possible.
- A Derridean deconstructive reading of key texts like Dugan Laird's classic book on training and development, Thayer & McGehee's book on training which was heavily influenced by psychology, and various competency models, etc.

- Exploration of the creation of subjectivities (influenced by the *ethical* work of Michel Foucault) of trainers who have attended train the trainer programs.
- Exploration whether or not the rapid global expansion of ASTD ideas through bodies like US-AID is a manifestation of American Imperialism.

### Personal Reflections

*To deconstruct the subject is not to negate or throw away the concept; on the contrary, deconstruction implies only that we suspend all commitments to that to which the term, 'the subject,' refers, and that we consider the linguistic functions it serves in the consolidation and concealment of authority. To deconstruct is not to negate or to dismiss, but to call into question and, perhaps most importantly, to open up a term, like the subject, to a reusage or redeployment that previously has not been authorized.*

*(Judith Butler, 1992, p. 15)*

Coming to UGA, I wanted to construct a culturally relevant train the trainer literature and practice culturally relevant training pedagogy bounded by the decolonization literature. I still want to do it, but I am cognizant of a few things. First, in a country like mine with 100 ethnicities with a distinct language, custom, and culture, what culture will I base my pedagogy on? Further, even if I successfully develop and practice a culturally relevant training pedagogy, the changes I make will, in all probability, be *cosmetic* in nature. The foundations cannot just be thrown out. Since the training and development we see, read, and practice is based on the industrialization that started in Western Europe, another foundation does not exist, which I can stand on. However, it does not mean nothing can be done.

Training and development for me is a field that I "cannot not want" (Spivak, 1993, p. 46). I plan to continue teaching and researching in the training and development field. However, I am circumspect I will engage in research focusing on topics like 'culturally relevant training practices' or 'culturally relevant training pedagogies' where culture is understood in the traditional sense with a capital C. I plan to base my future work on post-colonial theorization. By

*post*, I am not using *post* in the usual manner it might be understood – after something. One reason that does not make sense for me at a personal capacity to engage in studies tied up with geographical colonization is that I come from one of the few countries in the world that an invading force has never colonized. So, my immediate interlocutors nor I have the nuanced understanding of living in a country with a colonized past. My affinity with the *post* is the one that is understood as a permanent critique. Gayatri Spivak, a leading *post* scholar, influenced by Derridean ideas, has discussed her own ambivalence about the impossibility of being an influential global scholar of the *west* and a non-western female academic from India deeply critical of the western ways of being. Spivak has discussed how by conjuring something she has labeled as *strategic essentialism*, she has constantly pushed at the margins and continues to occupy the space. I plan something similar in my work: resist the essentialism extant in the training and development field by constantly pushing the field's boundaries. This dissertation has been a small endeavor towards that end.

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