TRANSFER: INVESTIGATING POST-TRAINING INTERVENTIONS THAT INFLUENCE

BEHAVIOR INTENTIONS OF SOCIAL STUDIES TEACHERS

by

KIMBERLYNN HENDRICKS WESTON

(Under the Direction of Karen Bryant)

ABSTRACT

Effective professional learning has the power to strengthen teacher content knowledge and pedagogy. Nationally, training has a 38% chance of making it to the workplace after six months. At Kenbrooke School District, less than 10% of social studies teachers indicate using district content and pedagogy training 18 months after the initial training. With public school funding at stake, the lack of transfer results in a poor return on investment and a waste of time for both the district coordinator and the training participants. Although transfer theory has been studied in the human resource development and business sectors, few studies have focused on K-12 social studies teachers. This action research study sought to address the problem of transfer in the context of secondary social studies teachers by focusing on intervention strategies that may strengthen the likelihood of transfer of Document Based Questions training into social studies classrooms. Four research questions framed this study:

1. How do action research team members currently design district-level social studies training?

2. What are the perceived levels of learning and training transfer for study participants in their classrooms?

3. Are social studies teachers' learning and transfer influenced by professional learning interventions? If so, to what extent?

4. What is learned by the action research team regarding training design and transfer theory?

Findings from this mixed methods study indicate that transfer is aided by embedding opportunities to address participant attitude toward training and perceived barriers to transfer immediately following district training. The results implied that district trainers should adopt post training interventions informed by the theory of planned behavior to improve teacher intent to transfer. Teacher attitude and perceived behavioral control toward transfer were influenced by goal setting and self-management training interventions, respectively. The influence of subjective norms was realized through classroom observations. The study identified theoretical connections between teacher intent to transfer and post training interventions. Future research studies should consider moving beyond transfer intent to actual transfer by extending data collection period among social studies teachers.

INDEX WORDS: transfer; theory of planned behavior; goal setting; self-management training; social studies

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DEDICATION

To my husband, Brian Weston: Thank you for being a great husband! I needed constant encouragement during this doctoral program and you were there every step of the way. God really blessed me when you came into my life. I love you!

To my smart and beautiful daughters, Brooke Elisabeth and Kendall Rae: Mommy did it! Thank you for being patient while I was working. I hope that by watching me complete this degree you will be inspired to set life goals and to meet them - even when they seem really hard.

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And to my daddy, Wardell Hendricks: I really miss you. I started and completed this program because you **<u>ALWAYS</u>** said I could! I wish you were here in person but I know you are cheering me on from heaven. XOXO

"To Him who is able to keep me from stumbling and to present me before his glorious presence without fault and with great joy – to the only God our Savior be glory, majesty, power and authority, through Jesus Christ our Lord, before all ages, now and forevermore! Amen."

- Jude 24-25(NIV)

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Wisdom is like a baobab tree; no one individual can embrace it. – Ghanian proverb

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CHAPTER 1

INTRODUCTION

Social studies instruction is critical to the sustainability of American society, yet K-12 public education policy and legislation create a hierarchy among content areas that leaves history, government, civics, and economics as an afterthought in our public schools (Heafner & Fitchett, 2012; Klebacha, 2008). National policies such as the 2001 federal legislation, No Child Left Behind, put an emphasis on English language arts and mathematics, while recent emphasis on Science, Technology, Engineering, and Math (STEM) education has created a national emphasis on funding for those content areas (Winstead, 2011). The development of national Common Core State Standards set clear learning goals for mathematics and English Language Arts, and the associated state accountability measure, the College and Career Ready Performance Index (CCRPI), put a heavy emphasis on these two subjects as well (Cowgill, 2015). Due to the focus on growth in other subject areas, social studies content remains of secondary concern.

Kenbrooke School District (pseudonym) is a large urban public-school district in the southeastern United States. The district serves a diverse population of nearly 102,000 students. The students in the district are comprised of 63% African-American, 17% Hispanic, 11% White, 6% Asian, and 3% multi-racial and other. There are 137 schools and centers and 15,500 employees. The vision of the Kenbrooke School District is to inspire our community of learners to achieve educational excellence. Our mission is to ensure student success, leading to higher education, work, and life-long learning. Essentially, every department works to provide a quality educational experience for students so they can be college and career ready for the 21st century.

In my role as the K-12 Social Studies Coordinator in the Curriculum and Instruction (C&I) department, I manage all of the K-12 initiatives that relate to social studies. I coordinate and facilitate professional learning for elementary, middle, and high school social studies teachers. Beyond coordinating professional learning, my responsibilities include writing and planning the curriculum, developing assessment items, coordinating academic competitions, and advising the superintendents and other departments on matters pertaining to social studies. There are two content coordinators in English language arts, mathematics, science and social studies.

Historically, there has been an unwritten yet widely accepted hierarchy among core subjects in Kenbrooke School District. Providing district-wide professional learning for social studies teachers in the Kenbrooke district is challenging because local school budgets are earmarked primarily to support achievement in English language arts and mathematics. Pressures from national and state achievement formulas made mathematics and English language arts a priority in our schools. English language arts and math teachers have access to more local support, more resources, and more funding than social studies teachers. Curriculum coordinators in math and English language arts also have more district personnel support than social studies.

Recent state legislation relaxed the amount of required testing for social studies to only grades three, eight, American history and economics. Students are still tested annually in ELA and mathematics in grades three through eight and at least twice for each subject in high school. The Kenbrooke School District also elected to implement Measures of Academic Progress (MAP) testing as progress monitoring for reading, mathematics, and science. The MAP provides interim assessment data on student ability to master skills in specific areas. Currently there are no MAP assessments in social studies. Research suggests that an emphasis on high stakes testing

in English-language arts, reading, mathematics and science continues to marginalize social studies instruction (Misco, Patterson, & Doppen, 2011).

As a curriculum coordinator, I spend my time planning, executing, and supporting professional learning for teachers. Typically, content coordinators develop professional learning at the request of senior level cabinet members or based upon the purchase of new instructional and supplemental resources. Occasionally, professional learning has been offered because a partner organization wants to work with our district. Some training ideas come from the coordinator themselves based upon anecdotal data or at the request of a building principal. Other times, a vendor has a free resource and wants to share it with a large school district. Currently there are long term math and literacy initiatives, in addition to content and pedagogy workshops in the various content areas. Some professional learning experiences are series-based while others are one-day workshops. These professional learning experiences are funded by the district's general budget for curriculum and instruction and professional learning.

To maintain prominence in the world of curriculum, national social studies experts developed the College, Career, and Civics (C3) Framework for social studies in 2012. The C3 Framework puts inquiry and analysis at the heart of social studies teaching and learning through a 4-dimension process:

- Dimension 1: Developing Questions and Planning Inquiries: Students develop questions as they investigate trends, historical period, societal issues, and events.

- Dimension 2: Applying Disciplinary Tools and Concepts: Students analyze primary and secondary sources and apply unique disciplinary skills to investigate phenomena in history, geography, economics, and civics.

- Dimension 3: Evaluating Sources and Using Evidence: Students collect and evaluate evidence from sources to explain relationships among facts, events, and ideas.

- Dimension 4: Communicating Conclusions and Taking Informed Action: Students take a stance on issues and work individually or collaboratively to respond to phenomena in history, geography, economics, and civics.

Through this four-step process, social studies instruction is energized with rigorous teaching and learning by providing an active learning environment for students. Fortunately, the C3 Framework aligns itself seamlessly with the Common Core State Standards for English-Language Arts and Literacy in History/Social Studies. When students strengthen their ability to tackle open-ended questions and analyze documents in social studies, they ultimately strengthen their achievement on state assessments in reading and ELA.

The C3 Framework represents a shift in teaching for many of the teachers in Kenbrooke School District. Teachers need direct instruction in inquiry-based learning to increase the rigor and student engagement in social studies teaching and learning. Teachers need time to learn instructional methods on using social studies skills with students. School districts have a responsibility to provide substantive professional development to its teachers to meet the national, state, and local expectations for increased student achievement. DuFour (2001) reiterates that professional development must be a priority for superintendents and other district leaders, and stresses the importance of creating a collaborative culture to sustain professional learning. "(Leaders) must identify and implement specific, strategic interventions that help teachers work together rather than alone" (p. 20).

Kenbrooke social studies teachers often refer to themselves as the step-children of content areas. They are not monitored as closely as their colleagues in math, ELA and science.

They do not have as many opportunities for district professional learning. District-level social studies training does not occur often, but when training for social studies teachers is conducted, I am concerned that the teachers are less likely to transfer the latest content and skills in their classrooms. Social studies teachers are coming to district training however many of the teachers don't feel a real sense of urgency to apply their learning in the classroom. The professional learning strategies and teaching techniques are not utilized in their work environment. They are attending workshops but what they are learning is not transferring into the classrooms.

As a social studies coordinator, ample time and some district funds are earmarked to support teaching and learning in social studies. During the 2015-2016 school year, I coordinated a Document Based Questions (DBQ) training for social studies teachers in every elementary, middle and high school. Document Based Questions is an inquiry-based program that aligns with the College, Career, and Civic Life (C3) national framework for teaching social studies. It also aligns well to Kenbrooke School District superintendent goals to focus on literacy and critical thinking. The DBQ units are saturated with content that include engaging literacy strategies to support social studies content acquisition and literacy achievement. The workshop trains teachers on how to use compelling questions and primary source documents to lead students through an investigation of history.

Sixty-eight secondary social studies teachers participated in the first round of DBQ training in 2015. By the spring of 2017, fewer than 10% self-reported using the DBQ units on a consistent basis. That retention percentage rate is well below the average national retention average of 38% (Saks & Belcourt, 2006). I surveyed the 68 participants to find out why they didn't incorporate the DBQ units on a regular basis (Table 1). Kenbrooke teachers mentioned

time constraints, lack of support, and student readiness as reasons why they did not use the training in their classrooms.

Table 1

2015 DBQ Participant Responses

I do not have enough time to incorporate DBQ units consistently.	47%
My students are too low level for the DBQ process.	31%
I felt unsure about how to implement the units in my classroom.	22%
I can't make the units fit into what we are already doing.	12%

Feedback from Kenbrooke social studies teachers seemed to suggest that the time and money spent on district training is not yielding an appropriate return. Many stated that barriers including time, their beliefs about student ability, and lack of confidence were reasons why transfer did not occur. What can be done to increase the likelihood that social studies teachers will use what they learn in district training in their classrooms?

According to The New Teacher Project (TNTP, 2015), the average mid-sized school district spends approximately $18,000 per teacher, per year on professional development. The time investment on professional development per teacher averages to be 39 to 74 hours per school year. Kenbrooke School District spent approximately $1.4 million in professional learning in the 2015-2016 school year. This figure is consistent with the eight to twelve percent that organizations spend on training their employees nationally (Yamnill & McLean, 2001).

Theoretical Foundation

This study was initially framed by the transfer theory (Thorndike & Woodworth, 1901). Transfer refers to the extent to which trainees apply new knowledge or skills because of

participation in professional development training. Transfer is a core issue linking individual performance to organizational success (Yamnill & McLean, 2001). Transfer is essential to the life of any organization. It is one of the most direct ways to enhance organizational productivity. (Elliot, Dawson, & Edwards, 2009; Bhatti & Kaur, 2010). For training to be effective, organizations must have specific objectives and learning outcomes. Companies that fund professional development and training expect a return on their investment. In order to maximize that return on investment, organizations should focus on supporting trainee ability to transfer what they have learned into their job setting. Velada and Caetano (2007) noted however, that only 40% of new content is transferred immediately. That percentage falls to 25% after six months and drops further to 15% after a year. Unless organizations become intentional about transferring new knowledge and skills, companies will continue to lose money and competitiveness over time.

Researchers acknowledge that there are many variables that can influence whether or not participants take what they have learned in professional development and apply it to their work environment (Hutchins, Nimon, Bates, & Holton, 2013). Transfer is critical when the money and time invested in the training is taken into account. According to Bhatti and Kaur (2010), transfer of training is more valuable than whether or not the participants enjoyed the training (reaction) or if they actually obtained the intended knowledge (learning). Baldwin and Ford (1988) are considered pioneers in transfer theory. According to their transfer theory, the three main influences on training transfer are training design, participant characteristics, and the work environment (Baldwin & Ford, 1988; Velada & Caetano, 2007; Burke & Hutchins, 2008; Yamnill & McLean, 2001; Hutchins et al., 2013).

According to the transfer theory, participant motivation, training design, and organizational structure (Figure 1) can influence the extent to which social studies teachers will transfer inquiry-based learning into their classrooms. Participant motivation refers to the extent to which individuals feel intrinsically motivated to use what they are learning in a training or professional development. Highly motivated teachers are more likely to transfer new learning to their classrooms. Training design denotes how well professional learning is planned to motivate adult learners to transfer new learning (Lim, 2000; Sprouse, Reinerman-Jones, & Nicholson, 2010; Olivos et al., 2016). Work environment, or organizational structure, refers to how the organization itself promotes transfer of new learning from training into the participant's work environment.
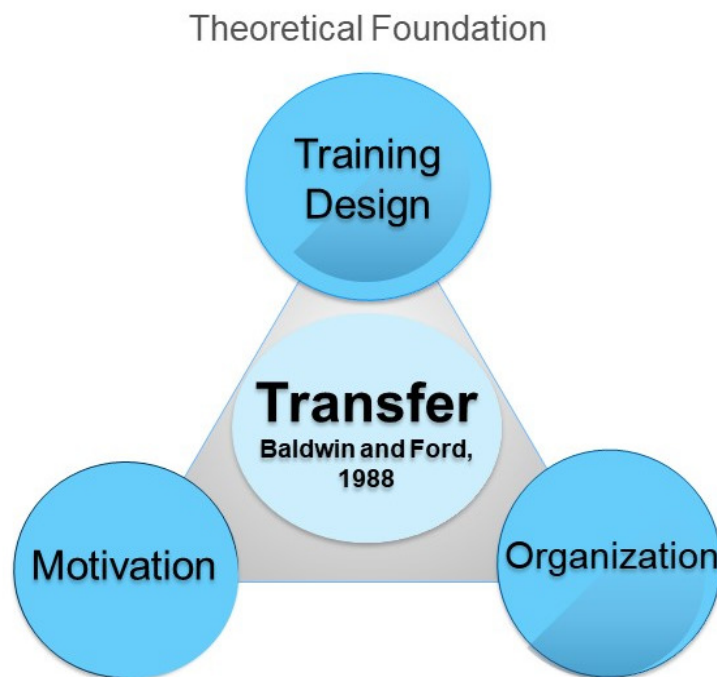
Figure 1. Illustration of transfer theory. Based on Baldwin & Ford (1988). This represents the theoretical foundation for the study.

In the thirty years since Baldwin and Ford identified the three main influences on transfer, new research has encouraged scholarship in the area to take a new approach. Baldwin, Ford, and Blume (2017) have called on researchers to further the research of transfer by treating trainees not as objects to be studied but as subjects to be understood stating, "…individuals come into training with all sorts of differences in goals, expectations, needs, and attitudes toward training that change over time as they experience the learning process and then ultimately attempt to apply trained knowledge when opportunities present themselves on the job" (p. 19).

Purpose and Research Questions

The purpose of this study is to investigate how training design interventions can influence teacher intention to transfer new behaviors into the classroom. Training transfer refers to the extent to which trainees apply new knowledge or skills because of participation in professional development training. Through this study, the action research team sought to understand how we can increase the likelihood that teachers will use new learning in their classrooms through researched-based training design interventions. This study was initially framed by the transfer theory with a particular interest in training design. By incorporating research-based interventions into training design, I hope to increase teacher intention towards implementing inquiry-based learning in their classrooms.

Research Questions

1. How do action research team members currently design district-level social studies training?

2. What are the perceived levels of learning and training transfer for study participants in their classrooms?

3. Are social studies teachers' learning and transfer influenced by professional learning interventions? If so, to what extent?

4. What is learned by the action research team regarding training design and transfer theory?

Through informal conversation, the action research team members noted that transfer among social studies teachers in the Kenbrooke School District might be influenced by a set of unique historical factors. Over the last ten years, the district has been led by four different school superintendents, each of whom championed his or her own set of beliefs about professional learning and instructional support. The changing nature of the organizational leadership over time can impact any teacher's trust in the district and cause them to become hesitant about the endurance of district initiatives and training (Thennakoon, French, & Bandara, 2017).

Action research team members also acknowledged that other aspects of the organization, including school leadership, scheduling barriers, and other priorities may influence the extent to which teachers use what they have learned in district training. The team also discussed participant motivation as an important variable related to transfer. Initially, the team agreed that intrinsic motivation was beyond our control, but when we consider training design factors, we are curious about how we can redesign training to intentionally embed opportunities for motivation.

Summary

Fewer than ten percent of secondary social studies teachers at Kenbrooke School District are transferring district training to their classrooms. According to Baldwin and Ford (1988), transfer is influenced by participant motivation, training design, and the work environment. This study focused on the components of training design as a catalyst to improve transfer among

secondary social studies teachers. Components of training design, including andragogy, identical elements, and general teaching principles are considered. This action research study expands on the understanding of transfer and includes post training interventions aligned to the theory of planned behavior.

CHAPTER 2

LITERATURE REVIEW

This chapter reviews the literature that provided the theoretical grounding for this study. This research included an examination of research, peer reviewed journal articles, and dissertations spanning several topic areas related to transfer and training design. The literature search focused on the past 10 years, as well as on seminal works and theories. In an effort to understand how to develop interventions to address the challenge of transfer in a social studies context, this review examined theoretical perspectives and empirical research from the education, human resources, and business fields. This review focused on transfer criteria of participant motivation, work environment, and training design. An evaluation of training design literature led to a review of adult learning theory or andragogy and the theory of planned behavior. The summary synthesized the theoretical perspectives and empirical research and culminated into the development of a conceptual framework and research questions for intent to transfer.

Training Transfer

The concept of training transfer has remained constant since Baldwin and Ford offered their definition as the extent to which trainees can effectively apply skills learned during a training to their actual job environment (Baldwin & Ford, 1988). Minor adjustments to the theory have addressed the degree of transfer such as transfer retention levels (Velada & Caetano, 2007) and transfer related to improved job performance (Noe et al. 2006). The theoretical framework has consistently identified participant characteristics, work environment, and training design as the

three determinants of transfer (Blume, Ford, Baldwin, & Huang, 2010; Holton, 1996; Chen, Holton, & Bates, 2004; Velada & Caetano, 2007).

Participant Characteristics

A major component of training transfer is the participant and their level of motivation to use the new learning. Motivation is the desire to use skills and knowledge learned in training. Motivation has been linked to efficacy, which has a direct correlation with transfer (Hutchins et al., 2013). Training design and perceived content validity influence participant self-efficacy which motivates participants to transfer learning (Bhatti & Kaur, 2010). Participant learning style can also influence motivation. Olivos et al. (2016) found that participants that process information more reflectively were more likely to transfer learned content and skills.

Friedman and Ronen (2015) discovered that participants with implementation intentions are naturally more ready to transfer new content and skills. Implementation intention implies a personalization of training. This personalization speaks to the andragogy methods that are encouraged by adult learning theorists (Kamisli & Ozonur, 2017; Friedman & Ronen, 2015). Cheng (2016) also noted the impact that intention can have on training transfer. Participant attitudes toward the training content in particular and their personal idea of training in general can impact the intent to transfer. Furthermore, individuals who are highly satisfied with their job are more likely to want to learn and transfer new content and skills into their occupation (Velada & Caetano, 2007).

Organizational Environment

An organization's value of learning can have an impact on employee performance in itself. Burke and Hutchins (2008) found that organizations that provide opportunities for trainees to practice new learning and involve supervisory support and coaching may have a higher rate of

training transfer. Transfer is mediated by peer and supervisor support afforded to the participant (Massenberg, Spurk, & Kauffeld, 2015). Supervisor support could be factored in as another component of the training design in that content coordinators could include principal awareness of training transfer expectations. This way, supervisors will know exactly what to monitor. Cheng (2016) found, however, that peer pressure to transfer may not be as strong in the field of education since teaching is mostly an autonomous activity.

Organizational learning theory contends that organizations that promote continuous learning have employees that are more satisfied in their jobs (Velada & Caetano, 2007). Through their research, Kim and Callahan (2013) determined that leadership had a significant effect on the organizational environment. Furthermore, organizations that provide support to their trainers on transfer methods have a higher incidence of training transfer (Hutchins, Burke, & Berthelsen, 2010). Overall, organizations with a focus on learning as the work, coupled with strong leadership and supportive trainers experience greater learning transfer.

Training Design

Training design refers to the degree to which training has been orchestrated to connect learning with job responsibilities by using the relevant training methods, examples, and instructions (Kim & Callahan, 2013).

Effective training design models. Research suggests that effective training design includes identical elements, general principles, and near and far transfer. Identical elements emphasize the value of the training matching the work environment. This need to match the learning environment has been discussed in regards to virtual training environments (Sprouse et

al., 2010) but should be noted as a viable design component in traditional face-to-face training environment.

According to Baldwin and Ford (1988), transfer of training is maximized when there are identical stimulus and response elements in the training and transfer settings, when a variety of relevant training stimuli are used in the training content, and when trainees are taught the general rules and theoretical principles that underlie the training content. When training design incorporates the realities of the participant's work environment, the likelihood of transfer increases (Devos, Dumay, Bonami, Bates, & Holton, 2007).

Baldwin & Ford (1988) also listed three instructional design factors that can impact transfer. According to them, transfer is maximized when the training is identical to the participants work setting, the training stimuli is relevant, and when participants are taught the general theoretical rules of the training. Professional learning design contributes to participant motivation when the training includes useful content and skills that are related to the trainee's job (Olivos et al, 2016). This utility or usefulness of training may be more important than trainee satisfaction because its utility encourages trainees to transfer new learning into their work environment (Velada & Caetano, 2007). Turner (2006) lists seven design principles that support learning. The design should:

- Increase ownership of the learning by including participants in agenda setting.
- Address all aspects including the organization, team, and individual.
- Be flexible enough to use teachable moments as they occur in real time for content validity.
- Support differentiation so that multiple learners that will embrace new content or skills
- Provide constructive feedback

- Be repetitive, adaptive, and reinforce learning

- Measure and reward performance

Andragogy

Turner's list is similar to Knowles' theory of andragogy for adult learners (Knowles, 1984). Andragogy emphasizes that adults are self-directed and expect to take responsibility for their decisions. Professional learning design must incorporate this fundamental aspect. The four principles of andragogy include: (1) Adults need to know why they need to learn something (2) Adults need to learn experientially, (3) Adults approach learning as problem-solving, and (4) Adults learn best when the topic is of immediate value. Design strategies such as case studies, role-playing, simulations, and self-evaluation are most useful (Wang, 2012).

Design should also begin with a rigorous and accurate training needs assessment (Elliot, Dawson, and Edwards, 2009). A pre-assessment of participant needs support utility reaction and motivation. A study of human resource development encouraged managers to "…develop systems of personnel development planning that establishes more explicit links between personal development and career progression" (Velada & Caetano, 2007, p. 292). Training design that is directly related to job utility encourages training transfer (Velada & Caetano, 2007; Burke & Hutchins, 2008; Bhatti & Kaur, 2010). Hutchins et al. (2010) questioned whether or not trainers know enough about training transfer to design for it. In their study of 172 members of the American Society of Training and Development (ASTD), they found that very few trainers received formal instruction on training transfer techniques. Those that did seek out formal training on transfer tended to have higher levels of education. Trainers in ASTD reported that they relied on conversations with peers at professional conferences to learn about the latest transfer techniques (Hutchins, Burke, & Berthelsen, 2010).

Theory of Planned Behavior

The theory of planned behavior (Ajzen 1991) is a social psychological model that describes the changes in behavior through intentions (Liao, Chen, & Yen, 2007; Kaiser, 2006). Theory of planned behavior (TPB) is a widely cited theory in social psychology (Armitage, Norman, & Conner, 2002; Kidwell & Jewell, 2008; Watson et al., 2014). The premise of TPB is that individuals that establish a behavioral intent toward an action are more likely to carry out that action. This theory is a psychological theory that depends on motivation (intention) and ability (behavioral control). The TPB is comprised of several concepts that represent a person's control over the behavior:

- attitudes - the degree to which a person has a favorable or unfavorable perception of the behavior of interest;

- subjective norms - the belief about whether most people approve or disapprove of the behavior;

- perceived behavioral control - the person's perception of the ease or difficulty of performing the behavior of interest;

- behavioral intention - the motivational factors that influence a given behavior where the stronger the intention to perform the behavior, the more likely the behavior will be performed (McCarthy & Garavan, 2006; Townsend et al., 2003).

There are similarities worth noting between attitude and participant motivation of the transfer theory. Personal attitude in the theory of planned behavior refers to the individual's favorable or unfavorable feelings about performing the specific behavior. This theory suggests that the stronger the intention to act, the more motivated they will be to use new using new content and skills in their work environment. Subjective norms are the degree to which the participant

believes the behavior is important to co-workers, mentors, and supervisors. Training participants that return to an organization or work environment that expects them to use their new learning are more likely to transfer that learning. Subjective norms make peers and supervisors critical to the transfer process. Cheng (2016) states that "...subjective norms pertain to those who are important to the trainee, people with such referent power may influence the trainee's decision to a greater extent than less important people." p.447. They represent the social pressure that can work for or against a behavior change in the training participant.

Perceived behavior control is the confidence the participant has in their own skills and ability to perform the behavior (Townsend, et al., 2003; Yan & Sin, 2014). This is a point of perception. Training participants that perceive they have the ability to do what is learned in training are more motivated to transfer their learning. Training design that includes choice is also valuable. Patrick et al. (2012) found that participants that attend training on a voluntary basis have more perceived behavioral control and therefore have greater intentions towards the changed behavior.

Those that have a favorable attitude, positive subjective norm and a high level of perceived behavioral control will have greater intention towards the preferred behavior (Cheng, 2016). For the purposes of this study, the action research team will consider how including the constructs of the theory of planned behavior in training design can affect transfer for social studies teachers that attend district inquiry-based learning training.

Findings from key studies confirm the merits of training design components and the theory of planned behavior to influence participant intentions towards a behavior. Building on the work for Baldwin and Ford (1988), training design has a greater propensity to influence transfer when the design is aligned to the participants actual work environment, time is devoted

to practice the new content or skill during the training, and when they have opportunity to use what they have learned in the work environment (Lim, 2000). Yan and Sin (2014) noted that confidence, personal attitude, and social pressure all influenced teacher intentions to use special education inclusion strategies in Hong Kong schools. Empirical studies confirm that training design that influences teacher intentions has a greater likelihood of transfer (Friedman & Ronen, 2015).

Table 2

Empirical Analysis Summary Table

Author/Date	Key Findings
Baldwin & Ford (1988)	• Transfer is influenced by participant motivation, training design, and the organization. • Training design aids transfer when training is similar to work environment (identical elements); when it is based on general principles, when a variety of examples are a part of the training (stimulus variability) and when there are intervals of rest between learning segments (conditions of practice). • Feedback and overlearning were also two design practices to aid transfer.
Lim, Doo H. (2000)	• Participants noted high transfer was due to high relation to their job, quality examples during the training, and opportunity to apply training. • Low transfer was due to lack of opportunity to apply on the job, indirect relation to their job, and lack of understanding during training.
Yan & Sin (2014)	• Teacher attitudes, social pressure, and confidence in training were found to have significant predictive power on teacher intentions to carry out inclusive education models
Friedman & Ronen (2015)	• Participants that formed implementation intentions were more likely to transfer new learning than those that did not.
Townsend, M. et al. (2003)	• Workshops that included the theory of planned behavior significantly increased participant's intention to use theory in designing programs.
Taylor, P., Russ-Eft, D., & Chan, D. (2005)	• Skill development was greatest when learning points were used and presented as rule codes and when training time was longest. • Transfer was greatest when mixed (negative and positive) models were presented, when practice included trainee-generated scenarios, when trainees were instructed to set goals, when trainees' superiors were also trained, and when rewards and sanctions were instituted in trainees' work environments.
Cheng, E. (2016)	• A TPB training model can inform teacher's intention to transfer. • Attitude towards a behavior is a major contributor of transfer. • The autonomous nature of teaching may negate subjective norms as a major contributor of transfer.

Gap in Research

The literature review in chapter 2 primarily focused on human resources development and training transfer. Many researchers consider the phenomena of transfer from a business perspective (Yamnill & McLean, 2001; Stevens & Gist, 1997; Taylor, Russ-Eft & Chan, 2005; Lim & Morris, 2006; Lim, 2000). Other studies have considered transfer from the school level emphasizing the direct influence of the building principal as the supervisor (Yan & Sin, 2014; Cheng, 2016; Renta-Davids et al., 2016). I have not found a study that specifically addresses the role of training design for transfer in the context of a district level support to social studies teachers. A study that focuses on interventions that influence training design to increase the transfer intentions of high school social studies teachers is needed. Transfer is aided by participant motivation, design, and organization. The action research team sought to discover how to improve transfer through incorporating elements of the theory of planned behavior into training design.

As stated previously in chapter 1, Kenbrooke School District prioritizes subject areas based on state assessment requirements and state accountability measures. Burch and Spillane (2005) confirm this as not just a KSD phenomenon but one that happens at the policy level as well. Subject specific ability measures have influenced administrative priorities. The researchers note that "the problem of implementation is inextricably connected to the institutional environment of reform, rather than being solely a function of implementers' inability or unwillingness to carry out policy intentions" (Burch & Spillane, 2005, p. 54). These policy decisions to prioritize mathematics and English language arts have put social studies teachers out of practice when it comes to attending a district training and transferring what they learn into

their classroom (Thacker, 2017). The nuance of subject area provides a worthy inquiry in response to the gap in literature for the idea of transfer.

Conceptual Framework

The conceptual framework for this study is illustrated in Figure 2. As applied in my study, the literature review on transfer and the theory of planned behavior suggest that teacher transfer intentions can be influenced by professional learning interventions that explicitly include the theory of planned behavior (Townsend et al., 2003). The theory of planned behavior says that attitude, subjective norms, and perceived behavioral control can influence behavior intentions. Many researchers agree that attitude and motivation toward a behavior is critical to transfer (Cheng, 2016; Alhendal, Marshman, & Grootenboer 2016; Turab & Casimir, 2015; Friedman & Ronen, 2015).

Yet, Aluko and Shonubi (2014) suggest that the peers and supervisor within the organization hold just as much influence over training participants. In their study of 300 teachers and 18 principals, they found that having supportive peers and administrators encouraged participants to change their behavior. In the theory of planned behavior, the social pressure from peers and administrators represent the subject norms of the environment and can have a positive impact on behavior changes in teachers (Yan & Sin, 2014).

Perceived behavioral control is the third component of the theory of planned behavior. This component is based on participant confidence levels toward the behavior and how much control they believe they have over the behavior (Francis et al., 2004). Based on Bandura's (1986) concept of self-efficacy, participants that believe they can execute the behavior will have stronger intentions towards that behavior (Asghar, Hakkarainen, & Nada, 2016).

Few studies have examined the integrated ideas of participant characteristics, training design, and work environment. Cheng (2016) studied the theory of planned behavior as a framework to explain transfer intention and transfer maintenance for in-service teachers. In that study, attitude toward the new behavior and perceived control over the implementation of the new learning proved to be stronger than subjective norms, or pressure from peers and supervisors.   Lim (2000) studied transfer through the lens of post training interventions. Goal setting, "was shown to increase the motivation of trainees to transfer learned skills to the job." (Lim, 2000, p. 246). Yan and Sin (2014) studied the impact of attitude, subjective norms, and perceived behavioral control on transfer intentions of special education teachers in Hong Kong. In that study, they found that teacher intentions were influenced by the social pressure they felt from their peers and supervisors. Drawing from the work of Yang and Sin (2014), Lim (2000), and Cheng (2016), the conceptual framework situated post training interventions informed by the theory of planned behavior as an extension of training design to increase the intent of transfer among secondary social studies teachers at Kenbrooke School District.

This study wanted to understand how training design, a major contributor to transfer, can be improved to ultimately increase the likelihood that secondary social studies teachers will use district training content and skills in their classrooms. As illustrated by the conceptual framework below, the action research design team worked with secondary social studies teachers (intervention team) to explore transfer after a district training. Post training interventions based on the theory of planned behavior were utilized to increase transfer intention for the teachers and team learning for the action research members.
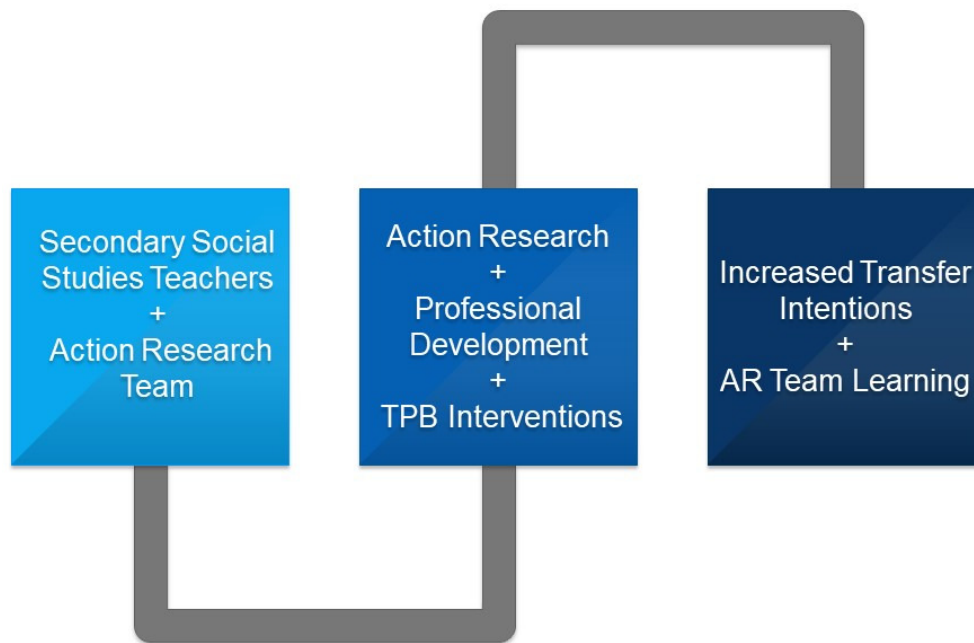
Figure 2. Conceptual framework for the study.

Conclusion

This Action Research study sought to understand how to deepen transfer in Kenbrooke School District. Training transfer is based on three variables: participant motivation, training design, and organizational structure.   The components of attitude and perceived behavioral control of the theory of planned behavior are similar to personal motivation in transfer theory. Teachers that feel positive toward district training will have stronger intentions to transfer what they have learned into their classrooms. Teachers that believe that they possess the skills to do what they have learned will also have stronger intentions toward applying what they have learned.

Subjective norms of the theory of planned behavior, or social pressure, are directly related to the organization in the transfer theory. Teachers that work in schools where their peers

and supervisors expect them to use what they have learned in district training will have a greater likelihood of transfer. Research indicates that training design that address participant attitude and confidence as well as work place factors can increase transfer intentions (Aluko & Shonubi, 2014; Noe, Sears, & Fullenkamp, 1990; Van der Locht et al., 2013). This study added components of motivation and work environment to training design by incorporating post training interventions that aligned to the theory of planned behavior. The action research team used the theory of planned behavior to inform training design plans to improve teacher transfer of inquiry-based learning practices.

CHAPTER 3

METHODOLOGY

According to Anderson and Herr (2014), action research is "inquiry that is done by or with insiders to an organization or community" (p. 3). The research is conducted with other members of the community in a reflective manner. The research team selects a shared problem to solve through understanding the context of the problem and studying it while it is happening. The action research team serves a dual role as both the practitioner implementing the action or intervention and also acting as a researcher observing the intervention at work in real time (Anderson and Herr, 2014). Action research provides an opportunity to investigate a problem in real time with members of the organization that the research project will affect. In using action research methodology, the researchers commit to group decision-making and a commitment to improvement (Dickens &Watkins, 1999).

Coghlan and Brannick (2014) provide three components of a good action research project: a good story, a rigorous reflection of that story, and an extrapolation of usable knowledge or theory from the reflection on that story" (p. 16). The story of my action research study involved the desire to strengthen professional learning for secondary social studies teachers. Kenbrooke School District (KSD) offers some district training to social studies teachers; however, anecdotal data suggested that few teachers actually use what they have learned in district training. The study included two action research teams: a design team and an intervention team. The action research design team studied training design interventions in an effort to improve transfer of training.

Action research methodology was used to understand how training design interventions can influence transfer in a social studies context. According to Coghlan and Brannick (2014), action research methodology includes three characteristics. First, the research is based on the action itself instead of background information about the action. Action research was interested in applying practical interventions to real and current problems. The design team took copious notes about the intervention (action) and reflected on its influence on the environment. Secondly, action research includes a democratic partnership. As a researcher, I was an actor within the environment and included other actors to assist in the research. The process was participatory. Every member of the team was a part of the organization to be studied. All team members had a vested interest in the research. The process was democratic in that all action research team members participated in considering the problem and possible solutions. The third characteristic of action research was the cyclic approach to problem solving. Once a problem was identified, the action research design team tried two rounds of interventions to solve the real problem of transfer among secondary social studies teachers. The design team began with identifying a problem, and then planned a course of action to solve the problem through interventions. The design team closely observed the results of the intervention and reflected on what happened and what was learned.

This cyclical approach is also known as the Lewinian cycle, named for action research founder, Kurt Lewin (Coghlan & Brannick, 2014). The spiral process begins with diagnosing the problem, planning the action, taking the action, and evaluating the action. As Herr and Anderson (2005) note, the plan, act, observe, and reflect process "forms an action research spiral in which each cycle increases the researchers' knowledge of the original question, puzzle, or problem and,

it is hoped, leads to its solution" (p. 5). The action research cycle in this study was conducted twice (Figure 3).

Figure 3. Action research cycle. Adapted from Coghlan & Brannick (2010).

The purpose of this study was to determine how professional learning interventions can influence transfer for secondary social studies teachers. A case study is a research strategy which includes an investigation of a phenomena or quintain using multiple sources of data (Robson & McCartan, 2016). According to Stake (2006), a quintain is an "object, condition, or phenomena to be studied" (p.6). The quintain of my research is the phenomena of transfer and how training design factors support transfer within the context of district social studies professional learning.

Research Approach

This action research study was based on a pragmatic worldview. Using a pragmatic approach, researchers draw on mixed methods research that includes both quantitative and

qualitative methods for collecting and analyzing data (Creswell, 2014). Pragmatism, according to

Creswell (2014), affords the researcher the freedom to follow the story as it unfolds,

> Truth is what works at the time. It is not based in a duality between reality
> independent of the mind or within the mind. Thus, in mixed methods research,
> investigators use both quantitative and qualitative data because they work to
> provide the best understanding of a research problem. Pragmatists agree that
> research always occurs in the social, historical, political, and other contexts. In
> this way, mixed methods studies may include a postmodern turn, a theoretical lens
> that is reflective of social justice and political aims. (p. 11).

Design Approach

I used a convergent mixed methods approach in an effort to understand how training

design interventions with a theory of planned behavior approach can influence transfer intentions

(Figure 4). Integrating both qualitative and quantitative methods provided a broader picture for

transfer intentions (Creswell, 2014).
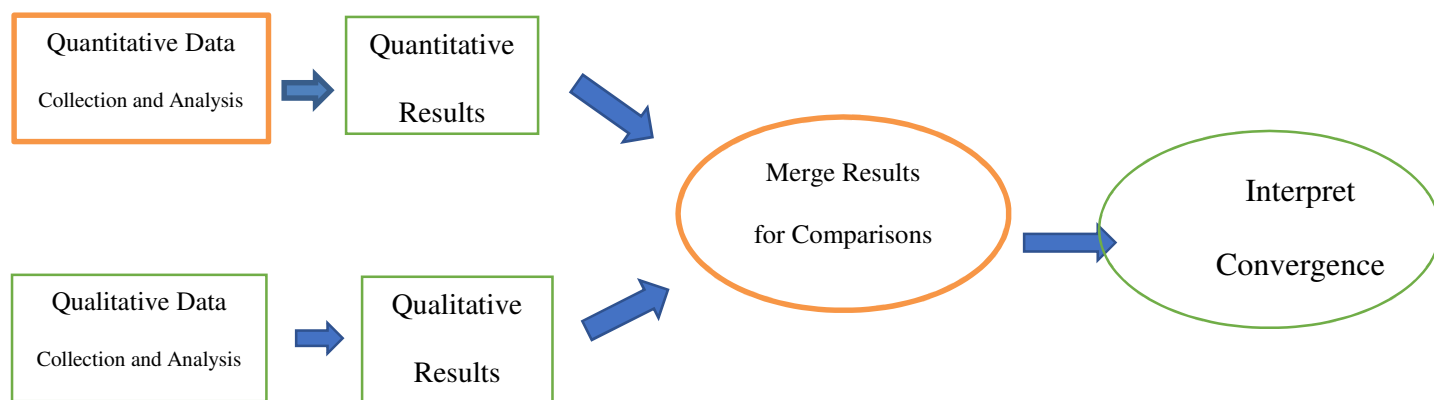
Figure 4. Convergent design approach. Adapted from Creswell (2014).

Sample

The study included nine individual cases of secondary social studies teachers in the

Kenbrooke School District. The single-case study was appropriate because the single

phenomena is transfer. Although the study included an intervention team of teachers from several different high schools in KSD, the action research focused on how interventions influence transfer intent for each teacher. The teachers were selected based on convenience sampling. They were all secondary teachers who pre-registered for an existing district training. From the group of thirty pre-registered participants, nine teachers agreed to join in the action research intervention team. The group represented a cross section of teachers at Kenbrooke School District (Table 3).

Table 3

Participant Characteristics

Participant	Race	Gender	School Type	Course	Teaching Experience	Training Experience
Chandra	African-American	Female	Traditional	Economics	10-20 years	None
Eric	African-American	Male	Traditional	Economics	1-5 years	None
Vanessa	African-American	Female	Magnet	World Geography	10 -20 years	Yes
Jean	African-American	Female	Magnet	Economics	20+ years	None
Kendra	African-American	Female	Non-traditional	Economics	10-20 years	None
Allison	White	Female	Non-traditional	World Geography	10-20 years	Yes
Leslie	White	Female	Traditional	World Geography	20+ years	Yes
William	White	Male	Traditional	World Geography	10-20 years	None
David	White	Male	Magnet	Economics	5-10 years	Yes

Table 4

Questions, Methods, and Timeline

Research questions	Data Collection	Analysis approach	Timeline
1. How do action research team members currently design social studies training?	AR team Interview	Deductive Coding Analysis for Themes	September 2017
2. What are the perceived levels of learning and training transfer for study participants in their classroom?	Classroom observation data	Deductive Coding Analysis for Themes	October – November 2017
	Learning Transfer System Inventory (Likert)	Cronbach's Alpha Analysis Descriptive Statistics	November 2017
3. Are social studies teachers' transfer influenced by professional learning interventions? If so, to what extent?	Participant Semi-Structured Interviews	Deductive Coding Analysis for Themes	December 2017
4. What is learned by the action research team regarding training design and transfer theory?	AR Team interview Researcher Journal	Reflection	January 2018

Data Collection

The research methods and timeline to answer the research questions is shown in Table 4. This mixed methods study integrated both qualitative and quantitative data at various stages of the study, creating a holistic understanding of the research problem (Creswell, 2014). Data collection included both quantitative and qualitative methods that were approved by the university Institutional Review Board (IRB) (Appendix A).

The Learning Transfer System Inventory (LTSI) (Appendix B) is an internationally known Likert scale survey that was created to assess individual perceptions of the catalysts and barriers to the transfer of learning from work-related training (Bates, Holton, & Hatala, 2012). The LTSI included a 58-question diagnostic assessment of 16 training factors supported by training transfer literature (Hutchins et al., 2013). The survey measured individual perception that participant motivation, training design, and work environment training variables can have on an employee intention to transfer training into their work environment (Table 5). The survey was used with permission (Appendix C).

Table 5

Learning Transfer System Inventory Factors

Learning Transfer System Inventory 16 factors	
• Content validity	• Personal capacity for transfer
• Intent to transfer	• Peer support
• Learner readiness	• Performance coaching
• Motivation to transfer	• Resistant to change
• Opportunity to use	• Supervisor opposition
• Performance self-efficacy	• Supervisor support
• Personal outcomes – positive	• Transfer design
• Personal outcomes – negative	• Transfer effort performance

The inventory has been used in seventeen countries and translated into fourteen languages. The LTSI has been most often used to explain transfer phenomena in a human resource setting (Hutchins et al., 2013; Choi & Ruona, 2008; Bates et al., 2012). In the first cycle of action research, the LTSI was administered to study participants during a professional learning intervention session following a district training on document-based questions. Cronbach's Alpha was used to determine the reliability of each measure in the survey. Descriptive statistics was used to analyze LTSI data in terms of mean, standard deviation, and variance.

Qualitative methods were also used to understand teacher intentions to transfer district training into their classrooms. Data from classroom observations and semi-structured interviews were analyzed for evidence of pre-identified themes and triangulated with the LTSI quantitative data. Classroom observations and participant interviews occurred during the second cycle of action research. Classroom observation of DBQ implementation was a critical aspect of this study. Pianta and Hamre (2009) argue that a major advantage of observing teachers in order to leverage improvements in educational outcomes is that they can be directly related to the specific interventions aimed at improving teaching. When the focus is to understand behavior, actions, and roles, observation is advantageous. They are useful in understanding what people do with district training once they return to their classrooms. School principals, department chairs, and action research design team members were invited to act as complete observers (Creswell, 2014), observing participant implementation of DBQ Project training using the College, Career, and Civic (C3) Framework Observation Tool. The C3 Framework is the guiding document that supports inquiry-based learning in the social studies classroom and is fully aligned to the skills learned in the district training. The tool was used to confirm transfer of inquiry-based learning through the implementation of DBQ in the social studies classroom.

Toward the end of the second action research cycle, intervention team members were interviewed about their experiences in implementing district inquiry training. Interviews provided direct information through the participants' own voices. I used a semi-structured interview approach, which began with uniform questions but allowed the interview to unfold naturally based upon the responses. By using a deductive qualitative coding strategy, the interview data will be transcribed and reviewed for themes that supported the transfer theory and

theory of planned behavior (Creswell, 2014). Finally, AR team members were interviewed to determine what the team has learned about training design and transfer.

<div align="center">**Analysis**</div>

The study followed a convergent parallel mixed methods study as the team gathered both qualitative and quantitative data to provide a full picture of how the data answers the research questions. In a convergent parallel mixed methods design, the researcher "merges quantitative and qualitative data in order to provide a comprehensive analysis of the research problem" (Creswell, 2014, p. 15). The action research team collected quantitative survey data and qualitative interview and observation data to present robust and coherent themes and findings (Creswell, 2014). The analysis shaped the story of transfer intentions among social studies teachers in the Kenbrooke School District.

Quantitative Data Analysis

The Learning Transfer Survey Instrument was administered immediately after the DBQ Project training to inform the work of the action research team. To protect the proprietary nature of the instrument, the survey data was analyzed by the owner of the survey instrument, Dr. Reid Bates, of Louisiana State University.   He used the Statistical Package for the Social Sciences (SPSS) for quantitative analysis. Cronbach's Alpha was used to determine the internal consistency of the sixteen variables under scrutiny in the LTSI survey. With Cronbach's Alpha, scale reliability estimates are measured between 0.00 and 1.0. A scale score reliability in the .75-.90 range are considered to be most consistent and reliable. The mean scores from the LTSI were also analyzed for to determine which factors had the most influence on teacher perception of training for transfer. The categories with the highest mean scores informed the action team planning for post training interventions.

Qualitative Analysis

Qualitative data analysis of participant interviews, classroom observations, action team meetings, and reflective journals served to identify teacher intent and evidence of training transfer. The data was coded to better understand the story being told about transfer of district training into the classroom. Vaughn and Turner (2016) validate the use of coding in qualitative research stating that coding allows the researcher to capture robust information to gain a deeper understanding of the research data. Classroom observations were conducted eight weeks after the district DBQ training in an effort to see transfer in action. Action research design team members used the College, Career, and Civic Life (C3) Framework observation tool to codify teacher actions as aligned to the training content. Participant semi-structured interviews were conducted four weeks later to capture the perceptions and intent to transfer among the teachers. The action research design team analyzed the data by transcribing, reading, and organizing raw interview transcripts to gain an initial understanding of the data (Creswell, 2014). I used the NVivo 10 software to efficiently store data, manage identification of codes, and create an audit trail for the research process (Carcary, 2009). However, we found that it was still advantageous to organize the data using Excel spreadsheet to understand the nuances of the data. A deductive coding analysis was used to determine how data from semi-structured interviews supported the theory of planned behavior and transfer.

Trustworthiness

Throughout the study, the teachers and action research members participated in frequent debriefing sessions with me as the lead researcher. Through these discussions, my understanding was widened as others brought their personal experiences and perceptions. Questions and

observations encouraged a refinement of my methods in light of conversations with the action research design team. These collaborative sessions were used to improve the trustworthiness of my study. Action research design team members reviewed the initial codes and interview data to confirm or challenge the synthesis of the data. Finally, transcriptions of action research team meetings helped to frame action research team learning at the end of the study. Triangulation of the survey data, classroom observations and participant interviews were supported by the convergent parallel mixed methods approach to confirm that the data was collected and interpreted objectively (Farmer, Robinson, Elliot, & Eyles, 2006). With the support of the action research design and intervention teams, we were able to improve our understanding of transfer intent among social studies teachers at Kenbrooke School District.

Limitations

This study sought to understand what aspects of training design influence secondary social studies teacher intent to transfer what they have learned at district social studies training into their classrooms. Researchers have long determined that transfer is influenced by training design, participant motivation, and the work environment. This action research study wanted to identify transfer intent among nine secondary social studies teachers in the Kenbrooke School District. The case study told an important story of how professional learning interventions can impact teacher behavior intentions, however the size of the participant group may be seen as a limitation. Recruiting social studies teachers from an existing district training may have also skewed data results. The length of data collection for this study may have been limited. Future research may consider a more longitudinal view to extend the research beyond intentions and into the actual behavior transfer.   Finally, my positionality as a district social studies coordinator may have skewed participant behaviors due to the perception of supervisory control.

Researcher Subjectivity

Reflexivity requires that researchers consider how their role as an insider may create bias during the action research process. I have been working with social studies teachers for ten years in the Kenbrooke School District (KSD). While I do not serve in a supervisory role, many teachers perceive my influence in the district to be much more comprehensive than it is in actuality. There is a persona that accompanies working at the central office. While I do not hire and fire teachers, I have been working to change teacher practices toward inquiry-based learning since 2015. To date, over 400 KSD teachers have been trained in DBQ. I have been committed to the inquiry-based process; however, support for the inquiry-based initiative in social studies has not been a major priority for the school district. I acknowledge that my prior experiences have the potential to show bias in my focus toward specific themes during the qualitative data analysis. Finally, the action research design team was made up of district and school-based social studies leaders. Each of us has an explicit interest in understanding how to strengthen training design for the benefit of improved transfer into the social studies classroom. Because we each have a vested interest in this topic, we must be aware of how our roles and history with the topic can shape our interpretations (Creswell, 2014).

The intent of this study was to gain a deeper understanding of how training design can influence transfer district training, such as DBQ training, into the social studies classroom. Using the theory of planned behavior as my conceptual framework, the study hoped to shed some light on what central office leaders can do to strengthen future training to improve not only teacher transfer into the classroom, but also return on investment and overall student achievement.

CHAPTER 4

CASE STUDY

Description of the Context

The context of this action research case study was Kenbrooke School District, a public

school district in the southeastern United States. The purpose of this mixed methods action

research study was to understand training perception and transfer intention among secondary

social studies teachers. The action research team was comprised of district level personnel,

including content coordinators, professional learning facilitators, and new teacher support

specialists.

Kenbrooke School District

Kenbrooke School District (KSD) is a large urban school district in the southeastern

United States. The district serves over 100,000 students and employs approximately 15,000

employees. Kenbrooke is a diverse district with students and parents speaking over 140

languages from more than 180 nations. KSD is a leader in STEM curriculum with 10 certified

schools and programs in more than 90 schools. School choice options are available in nearly 50

schools to include theme, magnet, International Baccalaureate, charter, and Montessori options.

The Division of Curriculum & Instruction (C&I) consists of elementary school, middle

school, and high school programs, as well as special services, professional learning, educational

media, career technology, assessment and accountability, and school improvement. Our mission

is to give each of these children an excellent education. Special service centers meet instructional

needs ranging from world language, science, and special education, to performing arts and career technology. The schools operate on a semester system.

Curriculum and Instruction Department Goals

In 2015, the KSD superintendent created task force comprised of a cross section of district leaders from curriculum and operations (C&O) department. The group was developed to respond to state accreditation requirements. The team charged the C&O department to: (a) implement and monitor the research-based instructional and leadership frameworks for C&O resulting in a systemic and consistent approach, (b) improve student learning outcomes in reading/English language arts, math, science, and social studies with alignment of K–12 expectations for literacy, numeracy, and science resulting in students who are prepared for postsecondary options including work readiness, and (c) implement a C&O processes that require accountability, monitoring, collaboration, on-going feedback, support and training, research and evaluation, and progress reporting at all levels resulting in consistent and improved student learning outcomes.

I have served Kenbrooke School District as a K-12 Social Studies content coordinator in the Curriculum and Instruction (C&I) department for approximately ten years. The C&I department is currently led by one director and includes thirteen content coordinators. Each coordinator manages all of the K-12 initiatives that relate to their content area, namely English language arts, mathematics, science, social studies, world languages, health/physical education, and the fine arts. We each have regular meetings with our respective groups of teacher leaders and offer content specific professional learning to teachers. Additionally, the content coordinators support the other departments with content expertise and advise the superintendent on content related issues as needed.

The role of the content coordinator has changed over the years. School districts have to view themselves differently than that of a traditional bureaucracy (Honig, Lorton, & Copeland, 2009). Until recently, the main function of the district administrator was to collect evidence of compliance with government regulations and to serve as a local spokesperson for state and federal entities. As key players in the standards-based educational environment, district office administrators have become more involved in the daily work of schools to improve student achievement. Along with this shift in focus, Kenbrooke School District was hit with dwindling resources due to the recession of 2008. The department decreased from approximately 40 directors, coordinators, and administrative assistants down to a team of thirteen. Faced with a change in focus for the central office and a two-thirds reduction in staffing, the content coordinators have had to become more strategic about the type of support that we could offer schools, principals, and teachers. District budgets were depleted for professional learning when the recession occurred in 2008. With the change in support for student achievement, a more compact content coordinator team, and dwindling budgets, content coordinators continued to support student achievement by providing meaning professional learning.

Social Studies Goals

Prior to our current superintendent, the KSD Professional Learning Department partnered with a company called the Document Based Questions Project (DBQ Project) to support a shift in the state English language arts assessment. The state assessment required students to show mastery in constructed response test items. This means students needed to gain confidence in their ability to write a response to open ended questions. The shift from multiple choice items to constructed response prompted a need to change how teachers prepared students for the state assessment. While based in social studies content, the DBQ Project offered a systematic

approach to critical thinking, analysis and writing. The initial goal was to train school-based leadership teams on the DBQ six step process and to have them repeat the training to all teachers on their staff. The district professional learning department invested one year in the process and then moved on.

In 2015, I decided to build on the DBQ Project training foundation and lobbied for a budget to continue the training specifically with social studies teachers. The training included DBQ content binders that present relevant social studies content with an inquiry-based focus. I organized eight days of training for two elementary teachers, three middle school teachers, and three high school teachers in each building. In all, approximately 280 social studies teachers were trained in the highly successful six-step DBQ method. The teachers were either self-selected to attend the training or they were designated by their building principal. The teachers who came to the training were not asked to train other teachers in their building. The only requirements were to agree to implement the same DBQ unit for their grade level and return for a second training on scoring DBQ essays. The six-step method guides teachers and students through the process of inquiry.

The lesson begins with a hook exercise to engage students to the compelling question. The second step is the background essay where students apply literacy skills to a short but content rich essay. Students then clarify their understanding the question and conduct a pre-organization of the lesson artifacts. The fourth step is to analyze primary source documents to help students answer the lesson question. Students organize the documents based on their analysis to support or refute claims made in their thesis. Finally, students debate their positions, using evidence from the documents to support and verbally validate their claims. They use what

they learn to write multi-paragraph, evidence-based essays using their documents, buckets, and outlines to support and explain their thinking (Reisman, 2012).

Since 2015, the DBQ method has become a cornerstone of inquiry-based learning for social studies teachers in Kenbrooke School District. District level professional learning facilitators have been trained to support DBQ implementation in schools. All school leadership teams were trained on this method and for that reason, name recognition is high. Yet, we still see teachers using low level lecture and note-taking techniques with students in the classroom. In a few instances, schools had either lost or never found the DBQ Project binder resources that were purchased for them in 2015.

By spring of 2017, fewer than ten percent of the 280 teachers trained in DBQ reported using the units and strategies on a consistent basis. The time and money spent on providing training for nearly 300 people seemed to fizzle. How do curriculum leaders, in good faith, plan and budget for district level training knowing that most teachers will not transfer what they have learned into their classroom? This concern is one that I have spoken to other district level leaders about. We wonder if DBQ training was a good fit for the district after all. Why aren't the teachers embracing DBQ Project? Why did transfer not occur for many of these Kenbrooke teachers? Was it the training? Did they need additional support? Are they unwilling to try new things? Action research was the right approach for this study because it allows the team to develop a solution to a very current problem in the Kenbrooke School District.

Action Research Story and Outcomes

Action Research Team

The action research design team consisted of district level personnel with either interest or oversight in social studies teaching and learning. Ms. Donna Fall joined the Curriculum and

Instruction team in May of 2017 as an additional coordinator for social studies. She came on board and joined the action research team immediately. Dr. Lyle Hammonds and Ms. Johanna Milton joined the team as Professional Learning Facilitators (PLFs). They each serve social studies teachers on a regional level and are responsible for developing and providing professional learning in their respective regions. Teacher Support Specialists (TSS) Mrs. Tisha Nolan and Ms. Nichelle Williams also joined the action research team. They are master teachers who also support social studies new teachers at monthly district meetings. The topics of these monthly meetings changed from week to week based on either request from the content coordinator or questions from the novice teachers. Ms. Nolan and Ms. Williams had a unique perspective on learning transfer for teachers with less than three years of experience.

This action research project focused on district level professional learning and its efforts to transfer learning into the classroom. I chose to include district level leaders and two school-based teachers that support a district initiative after school because they each have a vested interest in training design and transfer of learning into the classroom. I have worked with each action team member in some capacity during my ten years as a content coordinator. We have developed district professional learning and worked with school-based groups of teachers.

During casual conversation with colleagues and action team members, we wondered about the impact of our work. We plan and execute training throughout the school year. We go into classrooms to offer support. When we observe teachers in action, we are often underwhelmed by what we are seeing. Encouraging teachers to implement new teaching strategies can be arduous. One colleague expressed feelings of defeat:

> *I just wonder if I'm involved in the right work. I mean, I'm planning sessions and begging for a budget. I'm finding the location, which isn't easy to find in our district. I'm*

coordinating with the trainer, gather materials…the whole thing! Yet, the follow up visits

to classroom teachers makes me question it all. It's like they just came to training to get

out of school for the day. They are just not using what we've taught!

Coaching after a district training, according to one team member was very involved.

During an early team meeting, Ms. Falls commented,

...I had to make sure every component was aligned because my idea was if I had every

component of the activities, the step-by-step process, the example, everything has been

provided for them. There's no way that they just will not take this packet and go on and

prosper and wants to do it. And then follow up on the process to at least be done once.

Steps of the Action Research Team

The action research team conducted two action research cycles based on Coghlan &

Brannick's (2014) model of constructing, planning, taking action, and evaluating action (Figure

5).
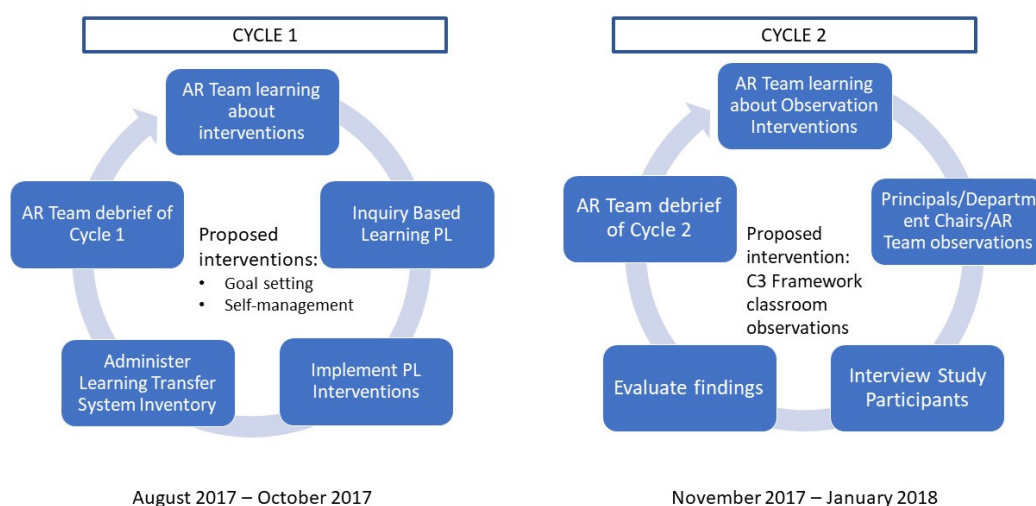
Figure 5. Two action research cycles used in the study. Adapted from Coghlan and Brannick

(2014)

During the diagnosing phase, we discussed the current state of professional learning from each of our perspectives and specifically talked about what we have observed in relation to evidence of DBQ Project implementation in schools. We reviewed the research on transfer, using Baldwin and Ford's (1988) work on the subject as our guiding research. We discussed the three components of transfer- participant motivation, training design, and work environment- and had a substantial discussion on what we could and could not control. We all agreed that intrinsic motivation was a powerful influence on teachers that attend district training and use what they've learned in their classrooms.

We also discussed how the educational environment works against teachers at times. Kenbrooke School District has experienced a great deal of change in a short amount of time. The school board hired five different superintendents over the span of ten years. Each superintendent brought with them their own plan for professional learning. Coupled with changes in the state assessment and accountability measures, principals and teachers have been thrown into a sundry of programs and expectations. The target has always been student achievement and engagement, but the focus on professional learning for social studies teachers in particular has changed.

Table 6

Timeline for Interventions

Intervention	Action Research Team Activities	Anticipated Outcomes	Timeline	Data Collection
Action Research Team Meetings	Bi-monthly meetings	Action Research Team Learning	July 2017 – January 2018	Researcher Journal Action Research Team Interviews (Appendix F)
DBQ Project PL with Goal Setting and Self-Management Interventions	Post-DBQ training interventions September 2017	Increased intent to transfer by inclusion of TPB interventions	September – December 2017	LTSI survey Participant Interview data (Appendix G)
Post Training Classroom Observations	Observe DBQ implementation	Confirm transfer of district training	November 2017	C3 Framework observation tool

Action Research Team Meetings

Once the action research design team was set, the first order of business was to synchronize calendars for meetings. This design team is unique because we do not all work in the same building. Finding shared time to meet bi-monthly over five months was challenging. The two new teacher support personnel were also classroom teachers, which meant they were only available after school. The two professional learning facilitators were assigned to different regions. Finding time that all of us could meet was the first hurdle. The first meeting was held in July 2017. During the first meeting, design team members got to know each other, to understand the purpose of action research, and to sign confidentiality agreements. We discussed their role as action researchers including the expectation that action research team members would agree to participate in recorded conversations. We set meeting norms and reviewed our calendar for the

next six months. Due to a couple of unavoidable conflicts, we discussed having make-up

meetings as needed, or potentially scheduling a phone conference or Skype session with a

member who could not be on site.

August 2017

The second design meeting was scheduled in August after I received approval from the

university Institutional Review Board (IRB). During this meeting, we discussed methods for

designing training for teachers. The conversation was more about the logistics of training such as

the location, the substitute forms, ordering the supplies, and printing the sign-in sheets. We were

not discussing how we design training to encourage teachers to change their behavior. As I

pressed harder to move the conversation to the process of adult learning, team members agreed

that they always set clear goals and tried to include hands-on learning experiences. The

professional learning facilitators on the team discussed how important it was for them to model

expectations after teachers attended professional learning sessions. The new teacher orientation

facilitators talked about helping new teachers translate what they learn into instructional

planning.

I always thought that our training left the implementation to chance because the local

administration was rarely aware of what they were learning. If no one at the local school was

inspecting implementation, the less likely that training participants would use what they had

learned. We discussed the strength of our evaluation of training overall as a possible issue. The

district tool evaluated the participant reaction to the training and how much they learned. The

tool rarely asked participants to evaluate how the training may change their behavior or create

the desired results. We reviewed the Kirkpatrick Model for Evaluation (Kirkpatrick &

Kirkpatrick, 2006) and had robust conversations about whether or not our evaluation encouraged teachers to use what they learned in the classrooms.

We agreed that evaluation was important but wanted to strengthen the actual training design. How could we redesign training to motivate teachers to actually use what they are learning? During the second August action research team meeting, I presented the team with research about the theory of planned behavior. As stated earlier, the theory of planned behavior is a social psychological model that describes the changes in behavior through intentions (Ajzen, 1991). Antecedents such as attitude, pressure from peers and supervisors, and the individual perception of behavioral control influence behavior intention which leads to the actual behavior. Instead of resigning ourselves to the fact that as district leaders we only actually control the design of a training, the action research team determined that adding interventions that address attitude, confidence (perceived behavioral control), and peer/supervisor expectations (subjective norms) could encourage the participant intention to use training content and skills in the classroom.

Through further research on training design and the theory of planned behavior, we identified goal setting and self-management training as a good fit for action research interventions. Goal setting is a motivational strategy that can also be embedded in training design (Locke & Latham, 1990). The design team hosted a goal-setting training with intervention team members directly after a social studies professional learning workshop on the DBQ Project in September. Participants learned about the goal-setting process, characteristics of effective goals, and an explanation for the effectiveness of goals (Gist, Stevens, & Bavetta, 1991; Perugini & Conner, 2000; Brown, McCracken, & Hillier, 2013). They were asked to identify a specific goal and to list the steps they intended to take to reach that goal. The implementation of this

intervention was based on research that determined that setting challenging and specific goals would lead to higher performance because participants direct their attention toward that goal (Kanfer, 2005).

Intervention team members also learned about self-management interventions (Frayne & Geringer, 2000). Originally designed to help individuals avoid relapsing to addictive behaviors, self-management training required participants to identify perceived barriers to transferring inquiry-based skills to their classrooms. After intervention team members identified barriers to transfer, they were asked to develop strategies to overcome those obstacles when they returned to the classrooms (Richman-Hirsch, 2001). Before the end of the goal setting and self-management intervention session, intervention team members were asked to list and discuss detailed goals and self-management strategies to use when they returned to their classroom.

During the summer, the DBQ Project introduced new units to support world geography and economics curriculum and I quickly added a new training session to the fall professional learning calendar. Since we were still building capacity with DBQ across the district, we chose to use the pre-scheduled training as our focus for this study. We invited each high school to send one world geography teacher and one economics teacher to the training. Thirty-two teachers pre-registered for the training. The DBQ Project training proved to be an appropriate fit because it met many of the criteria of identical elements theory of training design. The training situates literacy skills into the context of the social studies curricula. During the training, teachers use the actual materials and apply them as if they are the students. There was also an opportunity for teachers to practice implementing the six-step process. By the time the training was over, the teachers were reasonably equipped for implementation in their classrooms.

Sample Participants

I used convenience sampling to create the action research intervention team. Convenience sampling is a nonprobability sample based on availability (Creswell, 2014). This type of sampling "allow[s] investigators to take advantage of potentially large sample sizes… including the capacity to access difficult-to-reach populations and to recruit across wide geographic areas" (Owen et al., 2014). All of the teachers who registered for the training received an invitation via email to participate in the study (Appendix D). The initial sample included five teachers. To ensure the sample would be diverse, the design team made additional pleas to secondary social studies teachers. Eventually, nine teachers joined the intervention team. The study participants represented a cross section of Kenbrooke School District by race, gender, school type, teaching experience, course, and DBQ Project training experience. A brief description of each intervention team member is below.

Chandra was an African-American female teacher with seventeen years teaching experience. She works in a traditional middle class high school as an economics teacher. The district training was her first experience with the DBQ Project.

William was a White male world geography teacher at a traditional middle class high school. He taught world geography within a pure ninth-grade academy program. William and Chandra are co-workers in the same school. This district training was William's first workshop with the DBQ Project.

Eric was an African-American male teacher with two years' teaching experience. Eric taught economics in a traditional high school that has struggled to meet state accountability expectations. The district training was his first experience with the DBQ Project.

Kendra was an African-American female teacher and department chair at a non-traditional accelerated program for students who have experienced gaps in their education. Kendra had twelve years of teaching experience in economics and world geography. The district training was her first experience with the DBQ Project.

Allison, a White female teacher, also worked with Kendra as a world history and world geography teacher. Allison had twenty-four years of teaching experience. The district training was her second workshop with the DBQ Project.

Vanessa was an African-American veteran teacher with twenty years teaching experience. She had attended at least one DBQ Project training during her career. Vanessa taught world geography at a hybrid traditional school that also housed a magnet program for gifted and talented students.

Jean was also an African-American teacher with twenty-seven years of teaching experience. Jean and Vanessa worked at the same school, serving gifted and talented students within a traditional high school. Jean taught economics. The district training was her first experience with the DBQ Project.

Leslie was a White female world geography teacher. She had twenty-two years of teacher experience. Leslie worked in a traditional high school with a high English Learner population. A veteran Advanced Placement teacher, Leslie was familiar with the DBQ process but this was her first training with the DBQ Project.

David was a White male economics teacher with five years of teaching experience. He worked at a non-traditional high school for performing arts. David was a veteran DBQ teacher. The district training was his third DBQ Project training.

By joining the intervention team, they each were asked to participate in monthly meetings, a survey, post-training interventions, classroom observations and a face-to-face interview. They also agreed to informal meetings over the six-month data collection period.

September 2017

We decided to administer the LTSI immediately after the training to determine participant perception of the actual training. As stated earlier, the goal of the LTSI survey is to measure participant perception of training against sixteen categories that influence transfer (Bates at al., 2012). Immediately after the DBQ Project training, study participants completed the LTSI survey in written format. We used that data to help the team understand transfer intent among the intervention team.

A week after the training and survey, the intervention team members met to discuss the training and to participate in post-training interventions on goal setting and self-management. Goal setting research was based on the work of Locke and Latham (1990). Setting a challenging goal led to higher performance than those that set easy goals or no goal at all. Richman-Hirsch (2001) posits that goals "lead to higher performance because they direct attention, mobilize effort, and encourage persistence on a task." (p.106).   Intervention team members were asked to set specific, timely, and challenging goals regarding DBQ implementation during the post-training intervention (Table 7).

Table 7

Intervention Team Member Goals

Participant	Personal Implementation Goal
Chandra	I will use at least one of the DBQs to have students to complete a document analysis with a debate (smackdown) by October 2017 with my 2nd block students.
Eric	I will teach "Fixing a Broken Economy: Did Obama Get it Right?" My students will be required to complete the writings in the curriculum. This task will be completed by the end of October 2017.
Vanessa	I plan to have students understand globalization and how it relates to North America, the benefits of globalization, and what has it done to Mexico.
Jean	I will teach about the Federal Reserve using the DBQ entitled "Is the Fed Good for America?" I will help my students write an essay. By the end of November, I will have completed the DBQ.
Kendra	Before November 2017, I shall complete at least one DBQ using a mini DBQ written for world history.
Allison	I will teach the DBQ "China's One-Child Policy: Was it a Good Idea?" I will make the necessary connections from this DBQ to the world geography standards related to population for the state of Georgia before October 30, 2017.
Leslie	I will implement my DBQ Project with geography prior to Thanksgiving break. Students will analyze the documents and write a thesis driven essay.
William	I will administer to all classes the DBQ on the most important ideal contained in the Declaration of Independence by Halloween 2017.
David	I will implement the DBQ "Are Corn Subsidies a Good Idea?" and have the students write the essay before the end of November 2017.

During the self-management segment of the post-training interventions, participants were asked to identify potential obstacles to training implementation and to develop a plan to overcome the barriers. Self-management training is taken from relapse prevention training designed for people with addictive behaviors (Richman-Hirsch, 2001). For the purposes of this study, I asked participants to think about the perceived barriers that they may face once they left the training. As a group, we discussed district, school, and classroom barriers that may impede their ability to move forward on DBQ implementation. A few barriers kept surfacing on each level (Table 8).

Table 8

Implementation Barriers

District barriers	School barriers	Classroom barriers
Curriculum tasks	Block scheduling	Time
Lesson planning template	Traditional scheduling	Student reading levels
Google Chromebooks		Too many students

Some barriers were also more personal, i.e., *I'm going to lose control of my class*, and *I don't want to grade all those essays!* The teachers listed each perceived barrier along with a possible solution to the barrier. At the close of the post-training interventions, participants agreed to host the scheduled classroom observations for the purpose of seeing DBQ implementation in action.

October – November 2017

The design team conducted scheduled classroom observations of study participants as they implement document-based questions six to eight weeks after the post-training interventions. In each case, school administrators and department chairs were invited to participate in the observations. This intervention brought participant subjective norms into play because it involved school-based peers and supervisors. Brown et al. (2013) noted that by adding peer and supervisor observation interventions, transfer among employees was more likely to occur. The College, Career, and Civic Life (C3) Framework observation tool (Appendix E), which correlates directly to the district DBQ training, was used during the observations. The C3 Framework merged student inquiry and analysis at the heart of social studies teaching and

learning through a four-dimensional process that aligns to the six-step process of the DBQ

Project (Table 9).

Table 9

C3 Framework and DBQ Alignment

College, Career, and Civic Life (C3) Framework	The DBQ Project Six-Step Method
Dimension 1: Developing Questions and Planning Inquiries. Students develop questions as they investigate trends, historical period, societal issues, and events.	**Step 1: The Hook.**
Dimension 2: Applying Disciplinary Tools and Concepts. Students analyze primary and secondary sources and apply unique disciplinary skills to investigate phenomena in history, geography, economics, and civics.	**Step 2: Background Essay.** **Step 3: Pre-Bucketing.**
Dimension 3: Evaluating Sources and Using Evidence. Students collect and evaluate evidence from sources to explain relationships among facts, events, and ideas.	**Step 4: Primary Source Analysis.** **Step 5: Bucketing.**
Dimension 4: Communicating Conclusions and Taking Informed Action. Students take a stance on issues and work individually or collaboratively to respond to phenomena in history, geography, economics, and civics (Council of Chief State School Officers, 2012).	**Step 6: Thrash Out/Thesis Writing.**

The C3 Framework design is aligned with the Common Core State Standards for English-

Language Arts and Literacy in History/Social Studies. When students strengthen their ability to

tackle open-ended questions and analyze documents in social studies, they ultimately strengthen

their achievement on state assessments in reading and English language arts. The C3 Framework

and DBQ implementation represents a shift in teaching practices for many of the teachers in

Kenbrooke School District. Through this four-dimensional C3 Framework process as evidenced

by the execution of the DBQ six-step method, social studies instruction can be energized with rigorous teaching and learning by providing an active learning environment for students (Council of Chief State School Officers, 2012).

All observations were scheduled at a time and date that were convenient to the participants. In some cases, design team members were available to observe the implementation. All principals were invited to attend each observation; however, only one principal was available to actually participate due to scheduling and other school duties. All observations were scheduled for at least 45 minutes. The C3 Framework tool (Appendix E) was used to guide each observation. In all, seven classroom observations were completed. Two of the intervention team members had constant scheduling conflicts. Eventually, one of these participants elected to leave the study altogether citing a demanding work load as the primary reason.

After the observations were completed, the action research team met to discuss what we learned. We noted that some teachers were actually using the DBQ units while others were not. Of those that were not using the complete units, we noted that many of them were in fact at least using the literacy strategies from the training. In one case, the participant seemed unprepared and attempted to fake DBQ implementation altogether. It was clear that the participant was not ready, therefore, that observation was cut short.

December 2017

Toward the end of the semester, I scheduled face-to-face interviews with each intervention team member. The eight remaining intervention team members were interviewed separately at their school site. The interview included nine structured questions (Appendix H) with the opportunity for follow-up questions for clarity. Each interview was transcribed and

shared with action research team members. During the action research team meetings, members reviewed initial coding for peer debriefing. Categories and codes were aligned to answer each research question. The findings are presented in Chapter 5.

January - February 2018

After winter break, I conducted a focus group interview with the action research design team to present the quantitative and qualitative findings to the group using the research questions as a guide for the conversation. Five design team members participated. The focus group lasted for approximately one hour. The focus group interview was transcribed and included in the findings along with notes from my researcher reflection journal. Our final question centered on group learning and the action research process. Ms. Fall, the newest member of the district office, expressed an enthusiasm about inclusion for social studies,

> *I'm just grateful that social studies is getting some attention through this project. We often find ourselves alone. You're a core content area, but the state doesn't count your test scores…you know? We put this action team together, and I feel like we have sent a message to teachers that we mean business.*

Design team members embraced the action research process as a positive experience overall. The team felt confident that we scratched the surface on transfer and our training design practices. Dr. Hammonds was certain that this work would continue not just at the district level but in his own work within his region.

> *This was a lot of extra work but it was the right work. I definitely plan to include these interventions when I work with teachers at my schools.*

A second and most surprising result of action research was the formation of an actual team. This study gave us the opportunity to work across departments and learn together. The team agreed to continue the conversation around training design, transfer, and post training interventions.

CHAPTER 5

FINDINGS

The purpose of this action research project was to determine how professional learning interventions to transfer design could increase the transfer intent in teacher participants after district training. There are three main variables that impact transfer: 1) the organization, 2) training design, and 3) participant motivation. This study focused on the inclusion of interventions patterned after the theory of planned behavior to incorporate motivation and work environment into the design. The theory of planned behavior posits that behavior is based on behavior intention. Behavior intention is based on attitude, subjective norms and perceived behavioral control.

As a team, we decided that attitude of the theory of planned behavior was akin to participant motivation of transfer theory. Teachers with a positive attitude towards district training would be more motivated to transfer learning into their classroom. Secondly, subjective norms had an influence similar to peers and supervisors in the work environment. Teachers with supportive peers and administrators would have a greater intent to use district training in their classroom. Finally, perceived behavioral control was likened to another intrinsic level of confidence. Teachers that are more confident about their ability to implement district training in the classroom would be more likely to do so.

The study sought to answer the following questions:

1. How do action research team members currently design social studies training?

2. What are the perceived levels of learning and training transfer for study participants in their classrooms?

3. Are social studies teachers' learning and transfer influenced by professional learning interventions? If so, to what extent?

4. What is learned by the action research team regarding training design and transfer theory?

This chapter will report findings from the action research case study for each research question. Findings were determined by analyzing data produced from the LTSI, C3 Framework observation tool, participant interviews, and action research team interviews. The quantitative analysis tools included Cronbach's Alpha for reliability and descriptive statistics of mean, standard deviation, and variance to determine which categories had the strongest influence on transfer. Qualitative analysis included transcription and coding for emerging themes using Microsoft Excel and NVivo software. This data, along with the researcher journal, was used to triangulate the data in an effort to make sense of the information in a meaningful way. A summary of the findings can be seen in Table 10.

Table 10

Research Questions

Research Questions	Findings
Q1: How do action research team members currently design social studies training?	Theme 1: Action research team members rely on school and teacher data when they plan training. Theme 2: Action research team members depend on intrinsic motivation, coaches, and supervisors to monitor the implementation of new learning
Q2: What are the perceived levels of learning and training transfer for study participants in their classrooms?	Theme 1: Identical elements and overlearning approach to DBQ Project training helped participants learn the six-step process. Theme 2: Participants have a greater intent to transfer district training that is relevant, practical, and easy to implement. Theme 3: Intent to transfer can be impeded by teacher beliefs about student ability. Theme 4: District training that is misaligned to school or district expectations can negatively influence intent to transfer. Theme 5: Supervisor and peer support can have a positive influence on intent to transfer.
Q3: Are social studies teachers' learning and transfer influenced by professional learning interventions? If so, to what extent?	Theme 1: Goal setting motivated participants to implement training. Theme 2: Identifying perceived barriers helped participants prepare for implementation. Theme 3: Prescheduled classroom observations encouraged participants to transfer district learning into their classroom.
Q4: What is learned by the action research team regarding training design and transfer theory?	Theme: Professional learning that plans for transfer will encourage teachers to transfer.

Research Question 1: Current Training Design Practices

This action research study began by collecting baseline data to determine how district leaders design training. The action research team members all support social studies teachers in some way. Mrs. Nolan and Ms. Williams are master teachers that also support new teachers through the Professional Learning Department. They report to a coordinator within that department who has a pre-determined framework for monthly new teacher support meetings. Dr. Hammonds and Ms. Milton are facilitators within the Professional Learning department but they

support different regional superintendents. They take their cues mainly from regional

superintendents and principals regarding their professional learning. Training that is offered the

teachers is often as a result of poor student achievement data. New teacher support and

professional learning facilitators rely on evaluation forms as their main source of data. As

content coordinators, Ms. Fall and I enjoy the most latitude in determining the content and

approach to professional learning for social studies teachers. We do not all work in the same

department which means our philosophies or approach to training could be different based on our

departments Focus group interview transcripts revealed two major themes:

1. Action research team members rely on teacher requests when they plan training.

2. Action research team members depend on intrinsic motivation, coaches, and

supervisors to monitor the implementation of new learning.

Theme 1 -. **Action Research Team Relies on Teacher Requests when Planning**

The first theme to emerge was that action research team members rely on teacher requests

when they plan training. The initial conversation about training logistics gave way to a shared

commitment to getting input from teachers as often as possible prior to planning professional

learning. They survey teachers directly to ascertain their needs. Ms. Nolan stated:

My approach for working with teachers is designed based on the need of the teacher and

the goal of the session. Working with teachers requires a delicate perception of their time

and direct needs.

There are times when professional learning needs are derived from supervisors. Dr. Hammonds

starting with the building principal first:

I generally meet with the school's administrator, and he shares what training the teachers

have stated they need, and I design a training from that conversation. I am doing a training

now on classroom management now for high school novice teachers. They have shared this need for this training with their administrator, or he or she has seen this need during classroom observations.

Team members also use data from classroom observations and collaborative planning. Professional learning is targeted based on gaps that surface from testing and climate data. School-based leader, Ms. Williams noted that using data to inform training plans helps build trust with the teachers:

I learn a lot from sitting in on collaborative planning with the teachers. Teamwork is a must. It is a best practice to touch teachers to see what they think they need and honor that feedback. Other times, data is collected and drives the direction of the training. Offering a training based on data keeps it focused on the work and not on pet projects. I think the teachers appreciate that.

These comments are aligned with the adult learning theory also known as andragogy. According to Knowles (1984), the first principle of andragogy is to include adult learners in the planning and evaluation of their learning. I was happy that we all consider teacher needs when planning training however, the team was less forthcoming when we talked about whether or not training was being designed to encourage teachers to apply their learning into the classroom.

Theme 2 – Personal Motivation and Support for Training Implementation

  The second theme that surfaced was that action research team members relied on personal motivation, coaches, and supervisors to ensure that teachers were using what they learned in the training (Figure 6). Action research members unknowingly have a theoretical approach to designing the content of training. Using teacher feedback and other data to determine training needs is a consistent practice. The conversation was less forthcoming about the actual process of transfer. Team members made assumptions about what happens after teachers leave a district training.
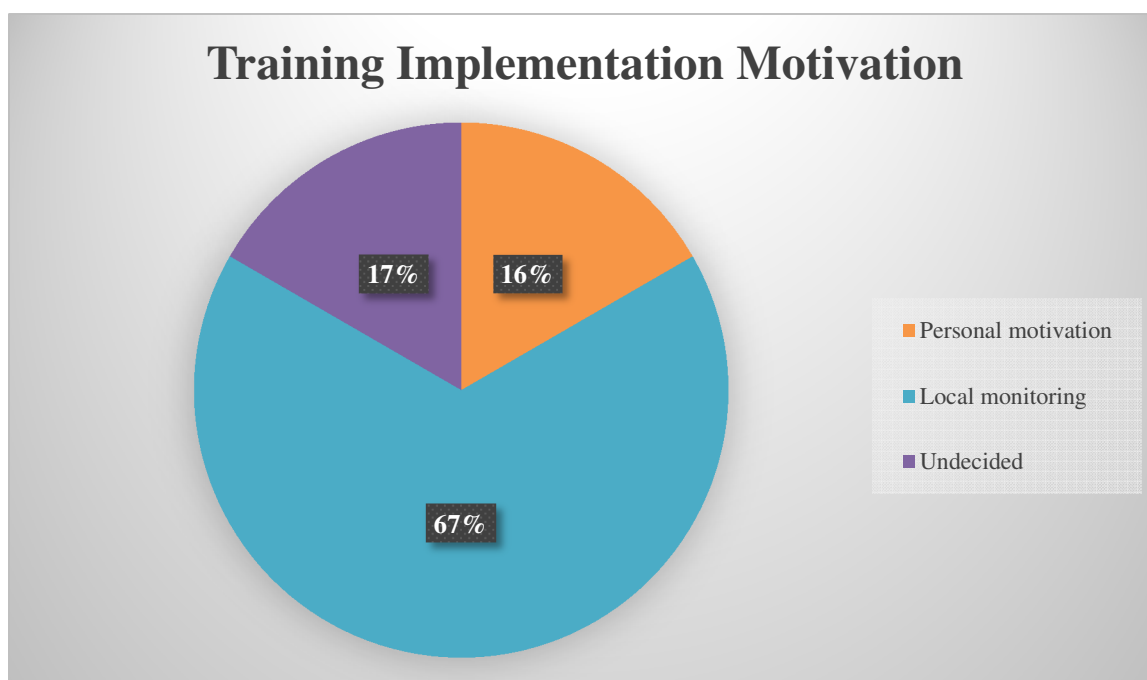

Figure 6. Training implementation motivation.

  Most of the action research team believed that principals and other members of the local leadership team played a major role in influencing transfer, however because they do not supervise principals, their best approach is to recommend and suggest monitoring to principals.

Others were either not sure or believed that the teacher's personal motivation was the determining factor for transfer. Ms. Williams explained,

> *Oh, I always assume that teachers value what we do enough to make it (training content)*
> *a part of their daily practices as needed.*

This response is indicative of the assumptions that the team made regularly. We all agreed when Ms. Milton mentioned the frustration of observing instruction and seeing the same, low-level teaching strategies being used after training. We learned that our district training design techniques left too much to chance.

Summary of Findings for Research Question 1

This action research study helped the team to recognize a need to align our efforts more with a shared approach to district training. The team has strong convictions about how training is developed but not much thought has been given to what causes teachers to use what they learn in district training. Supervisors and personal motivation are indicators of influence for transfer. Current training design practices among action research team members do not incorporate conditions for teachers to transfer district learning.

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Research Question 2: Perceived Levels of Learning and Transfer

</div>

A critical component of this study was to determine teacher perception of learning in a district training and intent to transfer the learning into their classroom. As stated in Chapter 3, I used both quantitative and qualitative methods to determine participant learning and transfer intent after DBQ training for secondary social studies teachers. Immediately after the training, participants responded to the Learning Transfer System Inventory, a 58-item Likert survey designed to assess training perception towards transfer. Intervention team members were also observed implementing the training in the classrooms. Face-to-face interviews were transcribed

and coded to compare with classroom observation data and survey results. The Learning

Transfer System Inventory scores were compared to classroom observation data and interview

results to triangulate the data.

Theme 1: Overlearning Supported Implementation

One theme that emerged was that identical elements and overlearning design techniques

used during DBQ Project training helped participants learn the six-step process. Participants

who had attended more than one DBQ Project training felt more confident about implementing

the six-step process in their classroom. This overlearning allowed teachers to solidify their

understanding and to also learn new information to add to their existing knowledge.   David

remarked,

> *I did learn more that I didn't know in the first training. The rubrics were in the*
>
> *book in the back which I never even noticed it and I never knew that. So, I found that out*
>
> *and I plan to start using them.*

Identical elements design theory (Sprouse et al., 2010) suggests that training that is designed to

mirror the work environment has a greater likelihood of transferring into the workplace. William

agreed that the DBQ Training mirrored the pace of his classroom environment:

> *The professional development was more us going through one of the DBQs on our own*
>
> *with the process by which she would've done it in a classroom, you know, and walking us*
>
> *through those steps, modeling those steps for us while going through it individually and*
>
> *using that PowerPoint as a supplement to when she needed to refer back to what we could*
>
> *but her presentation wasn't dependent on the PowerPoint. I could visualize myself using*
>
> *six steps will my kids.*

Data from the LTSI complemented these findings (Table 11). Transfer design and content validity are two ability scales that assess participant perception of the content and design of training. Transfer design was rated high with a mean score of 4.5000. The variation on this scale was extremely low at .278 meaning that participants believed the DBQ training was sufficiently designed to give teachers the ability to use the six-step process in their classrooms. Content validity, a scale that addressed the perception that the training content was applicable, scored lower among the participants. With a mean of 3.7667 and a variance of .470, some participants felt stronger about whether or not the training content fit the needs of their classroom.

Table 11

Learning Transfer System Inventory Data

Learning Transfer System Inventory Data

Category	Mean	Variance
Transfer Design	4.5000	.278
Content Validity	3.7667	.470

Theme 2: Relevance, Practicality, and Ease Influence Intent to Transfer

A second theme we identified that was related to research question two was that participants have a greater intent to transfer district training that is relevant, practical, and easy to implement. Intervention team members reported that it is important that training be readily transferrable from the onset. Presenting a training model that allows teachers to see how the training plays out in their classroom is a practice worth adopting in district training. Chandra shared this sentiment,

> *…if it's something that I can practically use in my classroom the next day I'm for it but if*

it's something that I cannot take to use the next day then it's a waste of time.

Training that is relevant and manageable is important as well. Participants agreed that DBQ Project training was relevant to their social studies standards and skills. Presenting the process in six steps proved to be an advantage for Leslie:

It really broke it down into small manageable chunks and just seeing that someone could do something and put a thesis statement on an index card say "Oh I can do all of this. I can start there. I can do all of this."

Relevance is critical to a district training. Teachers need to understand the purpose of the training and they need to recognize how it will help them in the daily life. Eric quickly understood the intent of the training,

DBQ is relevant. We use them as they were written but then you can also take a step further. The units are aligned to our state standards and the six-step process promotes critical thinking. I knew I would try it for that reason.

Qualitative data on relevant, manageable, and practical training aligned with quantitative data from the Learning Transfer System Inventory survey instrument (Figure 7). Motivation was measured in five categories. Mean scores for transfer effort, motivation to transfer, learner readiness, and performance self-efficacy were relatively high with some variance which means some participants felt more confident than others about transfer intent and perception of learning. The mean score for transfer effort, participant expectation that effort devoted to transferring district learning would lead to changes in job performance, was 4.5000 with a standard deviation score of .57196. Motivation to transfer measured participant intensity and persistence to transfer at a mean of 4.2667 with a standard deviation of .58373. Learner readiness was measured at a mean of 4.2667 with a standard deviation of .96609. This scale showed that some participants

entered the training more prepared than others. Performance self-efficacy, the belief that the participant is able to perform the transfer, had a high mean score of 4.0333 and a standard deviation of .97436. The lowest scale, performance outcome expectations, had a mean score of 2.9000 and a standard deviation of 1.088. Some participants felt that the transfer of DBQ Project training would lead to valued outcomes while others did not.
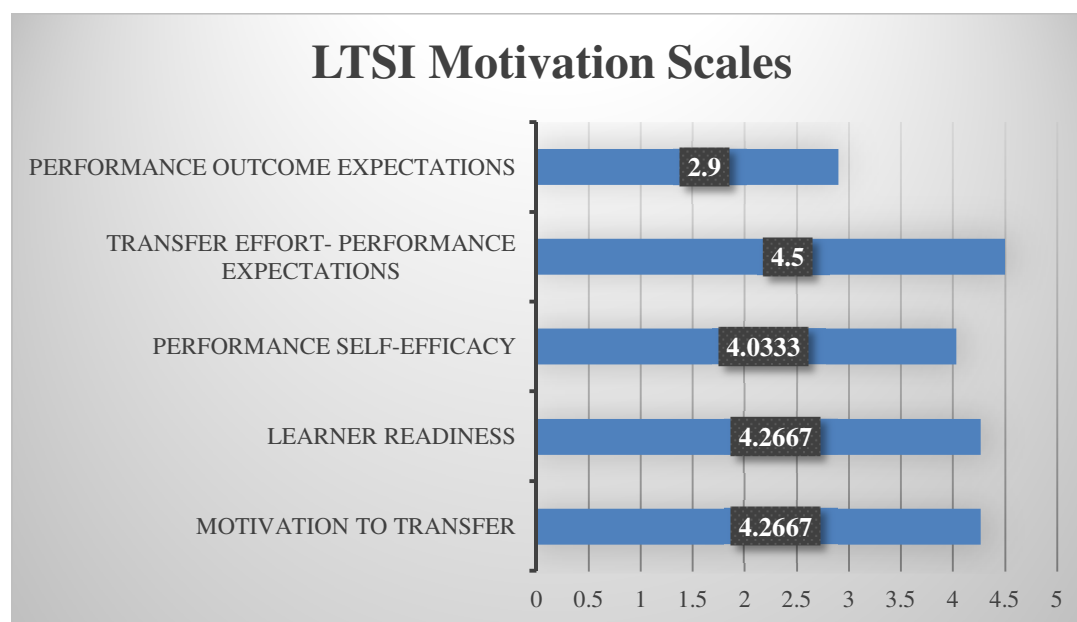
Figure 7. LTSI motivation scales

Theme 3: Intent to Transfer Impeded by Beliefs about Student Ability

The third theme related to this research question was that the intent to transfer can be impeded by teacher beliefs about student ability. Teacher beliefs about their own ability to use DBQ Project training were highlighted in the Ability/Enabling Scale on the LTSI. Personal capacity is a negative scale within the LTSI. The low mean score of 2.5667 meant that participants believed they had the capacity to implement the DBQ Project in their classrooms. They also reported a high mean of 4.5333 for opportunity to use the training. They

overwhelmingly believed that the training had equipped them with the resources and processes to apply the training.

Table 12

Ability/Enabling Scale Result

Category	Mean	Standard Deviation
Personal Capacity	2.5667	.149
Opportunity to Use	4.5333	.277

Survey data revealed teacher confidence about their ability to implement the DBQ Project in their classrooms. Classroom observation data and interviews told a different story. Of the eight classroom observations that were conducted, only five of the teachers were observed using the DBQ Project units and six-step process as it was intended. Two teachers were observed using literacy strategies from the training and one teacher did not use the DBQ Project units or strategies at all.
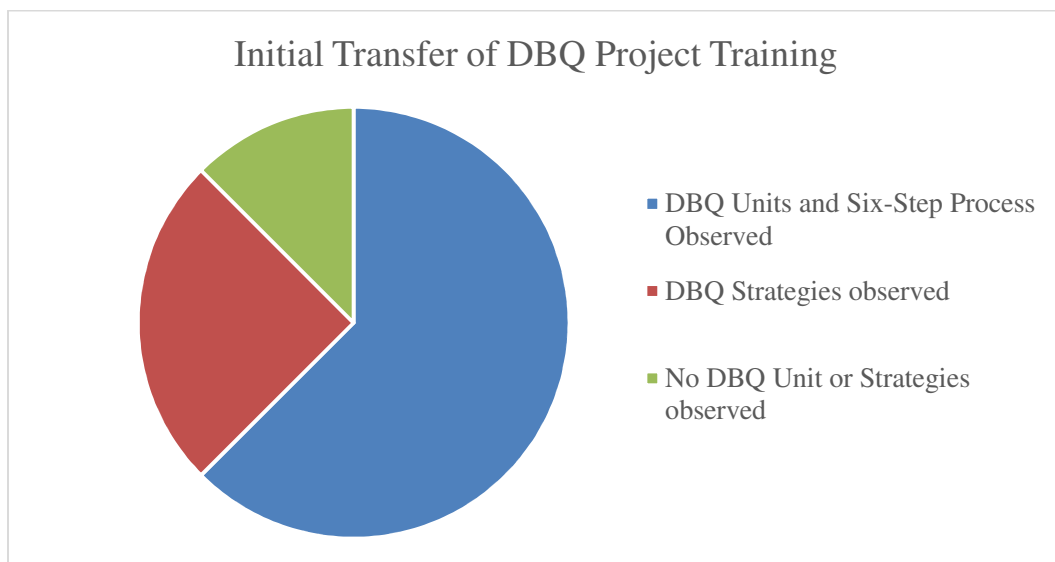

Figure 8. Initial transfer of DBQ project training.

Teacher beliefs about student ability to meet the learning challenges set by DBQ Project was a re-occurring theme throughout the face-to-face interviews. As determined by survey data analysis, the teachers were confident in their own ability to implement the DBQ Project training in their classrooms. They were less convinced that their students possessed the prerequisite literacy skills to follow the six-step process. As Vanessa noted, having a classroom of students with mixed ability levels was a challenge,

The combination of laying the groundwork needed before trying a DBQ even with the scale version will be difficult because I have mixed classes. I have students that should be accelerated all the way down to students who should be in self-contained classroom so that was more of an issue for me. I spent my time trying to find a workaround that would allow me to do the DBQ but I eventually just gave up.

The DBQ Project training requires that students read informational text, analyze, and build a thesis. Teachers shared concern about whether their students could actually do the work. This concern kept teachers worried about the amount of time it would take to plan lessons around the DBQ Project. Allison shared,

The special needs students, I look at their IEPs…they were low level. Even some of my general education students were so low that I found that just having to break stuff down a little bit more for them where some students can read their comprehension level is fine. These are students that you just have to sort of break things down more for them.

Still, there were teachers who were willing to meet the challenge of working with low level students. Even if the teacher believed the students would struggle, Eric decided to use grouping strategies to make the material accessible to all:

I'm especially worried about my students that are struggling to read. Now, one of the

things they said do not choose a student that may not be reading on a proper level but

pairing a student with one that is on proper level…that student being able to hear

another student, a strong reader can influence that student and so, that's what I try

to do with those students.

Theme 4: Misaligned Training Negatively Influences Transfer

Another identified theme was that district training that is misaligned to school or district expectations can negatively influence intent to transfer. District initiatives proved to be a barrier to the transfer of the DBQ Project. At the beginning of this study, the action research team was quickly faced with new initiatives from several Kenbrooke School District departments. Teachers were presented with a new mandatory curriculum in August. The rollout of the new curriculum was cumbersome. The plan was to have the curriculum uploaded into the district intranet site. That process was never complete making the curriculum difficult to access. Secondly, the district introduced a new lesson plan format that proved to be exhaustive for teachers. Additionally, the district began a one-to-one technology initiative for all teachers and students. Some of these district initiatives were highlights in interview data. Eric, for instance, is optimistic about his DBQ intentions but was still hindered at the thought of district barriers and student ability,

> *The new curriculum is kind of challenging for us. There are a lot of kinks that you had to*
>
> *work out and then one of the things I notice with the new curriculum, our students if you*
>
> *don't get to where they need to be for instance the pretest and post-test…our students tire*
>
> *very quickly if you don't build up their endurance. My own endurance is an issue too!*
>
> *I'm spending a lot of time with the new lesson planning template. It's really a pain!*

Social studies teachers were also faced with new content standards this year. Vanessa noted that just adjusting to the new standards kept her from making transfer of the DBQ Project a priority.

> *Well, I do know that because of the new standards it's trying to get used to the standards and then doing the DBQ because I had learned the previous standards before this year I probably could've implemented it a little bit more as opposed to now I was having to get the standards together and then align my different ones with the standards and also learning how they wanted to be taught on each standard.*

State assessment responsibilities came up as for economics teachers who feel pressure to prepare their students for End of Course (EOC) testing. Time for teaching the content is finite and teachers that don't automatically see the benefit of using district training saw it as a dichotomy between preparing the students for a selected response test or transferring district DBQ Project training. Chandra, an economics teacher remarked,

> *Some teachers are on board, some aren't so it's going to take some convincing and again, time being that biggest factor because for those teachers who are EOC based the students actually had to take the EOC last week and the week before that so literally they had seven weeks to teach an EOC course so I personally understand the hesitance for those particular teachers not to use the DBQ because it is time consuming.*

Yet, teacher enthusiasm was apparent in instances where the DBQ Project training complemented a school focus. One school adopted a school-wide literacy focus where all students were to read a piece of informational text and use comprehension and inference skills to analyze the piece. The teacher from that school was highly motivated to transfer the training into his classroom. Eric shared his excitement below:

> *I was so excited! I described when I got back… I described DBQ it's a small part… I*

mean it's a larger part of craft. Craft is smaller but when you take the DBQ it's a whole

broader picture and so, they were used to that part. They were used to numbering the

paragraph, checking the paragraph, and all of that but then you have with DBQ it takes

several steps further.

Theme 5: Supervisor and Peer Support Influence Intent to Transfer

The fifth theme identified in relation to this research question was that supervisor and

peer support have a positive influence on intent to transfer intervention team responses to the

LTSI survey measured several work environment scales to explain transfer intent (Figure 9). The

personal outcomes-positive scale was moderately positive with a mean score of 3 and a standard

deviation of 1.2276. This meant that some participants believed that transferring the training

would lead to positive outcomes for themselves. The personal outcomes-negative scale was low

with a mean of 1.5667 and a standard deviation of .68584. The participants agreed that not

transferring the training would lead to negative outcomes. The performance coaching indicator

assessed the whether or not teachers felt they would get feedback about the transfer in their

classrooms. That mean score was slightly lower at 2.3667 with a standard deviation of .88122.
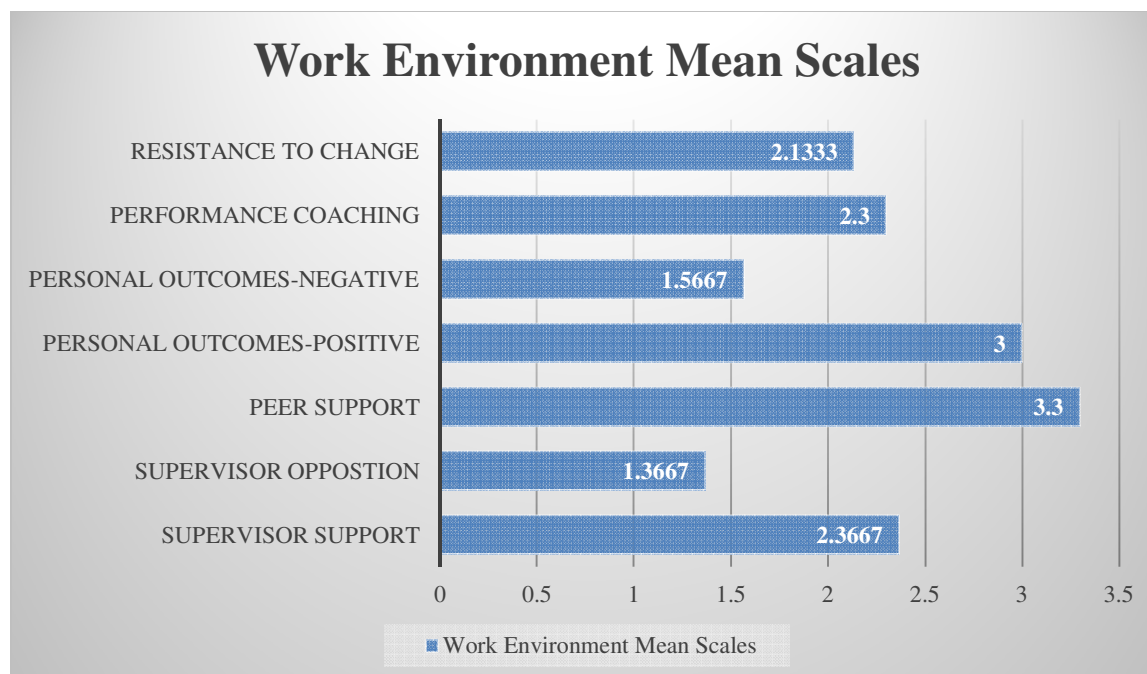
Work Environment Mean Scales

Category	Value
RESISTANCE TO CHANGE	2.1333
PERFORMANCE COACHING	2.3
PERSONAL OUTCOMES-NEGATIVE	1.5667
PERSONAL OUTCOMES-POSITIVE	3
PEER SUPPORT	3.3
SUPERVISOR OPPOSTION	1.3667
SUPERVISOR SUPPORT	2.3667

■ Work Environment Mean Scales

Figure 9. Work environment mean scales.

Peer and supervisor support represent subjective norms in the theory of planned behavior (Azjen, 1991). Intervention team members reported that peers and supervisors reinforce their intentions to use district learning on the job. With a mean score of 3.3000 and a standard deviation of .99998, peer support stood out over supervisor support. The mean score for supervisor support was 2.3667 with a standard deviation of 1.2516. These scores are moderate and the standard deviation suggests that some teachers may experience more support from peers and supervisors than others. The range of supervisor support is represented in participant comments below. Kendra reported that her principal is very supportive of training implementation and will partner with the teacher on next steps within their school,

>   *The minute I get back in to the building I talk with my principal. He has an open door*
>
>   *policy and that makes it really easy for me to just "Mr. Bleu this is what I learned. This*
>
>   *is what I'm going to redeliver to the Social Studies department." Get his input to see*
>
>   *perhaps if he has a different on take or in take for that particular subject so he's very*

supportive in that particular. Without that support I don't think I'd be able to implement

because teachers have total autonomy in their classroom and so without that

consequence factor.

The LTSI data showed that most participants did not experience supervisor opposition to transfer. The mean score for that indicator was 1.3667 with a standard deviation of .71059. Of those that mentioned not getting support from supervisors, the lack of support seemed normal. William acknowledged the principal workload as the reason they don't talk to their supervisors about district training,

You know, there are a lot of things going on so they might not be able to keep track of,

you know, which teachers were out for which things and why. So if they ask great, if they

don't I think of it more as they have so much other stuff to worry about than what was

going on.

As stated earlier, support from peers was a variable that influence teacher enthusiasm to transfer DBQ Project training in the classroom. In cases where the teacher had a practice of communicating with other teachers, they were more excited about transferring the new learning. The resistance to change scale measured teacher perception of how the transfer would be received by other teachers in their building. This scale was a negative scale in that a higher mean would indicate a stronger barrier. With a mean score of 2.1333 and a standard deviation of .74037, many teachers believed that adopting DBQ Project in their classrooms would be received positively by their peers. Eric's enthusiasm was evident in the comment below,

What we do as a department when we go to training we meet and we talk about things

that we learned. We share. I mean it's very important. Economically speaking, all of us

can't go to all the trainings so it's almost like teach the teacher and so we come back and

we explain what we learned. I actually talked to the Social Studies department. I

want to do a PL.

Eric was very detailed in the next steps he planned to take with his special education co-teacher.

What I did with my co-teacher as I sat down and I explained what is going to happen and

so, the DBQ manual has some information that I copied for her so she could go home and

call home and read it because you want to make sure that your co-teacher also has a buy

in. You don't want them in here just as an observer that you don't want to throw them

out in the world and they don't know what they're talking about. So, we sat down and we

talked once or twice a week so we're making sure we're on the same page but because I

went to the training and she wasn't there to learn the information I sat down and we

spent maybe an hour to go on over what we needed to do and what part she was going to

handle.

Still, teachers working in schools where interaction among peers is rare found peer

support to be nonexistent. Vanessa worked with peers but rarely connected with them about

classroom strategies or professional learning:

We're teaching two different subjects. He's doing the government push and I'm doing the

World Geography so we don't even get a chance to talk about the training really.

Summary of Findings for Research Question 2

Analysis of the LTSI, classroom observation data, and participant interviews revealed

five themes relevant themes about transfer and training design. Teachers reported that design

techniques such as overlearning and identical elements aided teacher perception of learning and

transfer. Many participants believed that DBQ Project training was relevant, practical, and

manageable, making transfer more likely into their classrooms. Teacher beliefs about the ease of

implementation of training was juxtaposed with their beliefs about student ability to maintain the rigor of the DBQ Project units. Many cited low reading levels and lost student stamina as barriers to transfer. Teachers named several district and school initiatives that conflicted with their intent to transfer DBQ Project training into their classrooms. New standards, new curriculum documents and mandatory lesson planning templates competed for teacher attention. Finally, the amount of support from peers and supervisors showed a direct correlation to transfer intent among teachers. Teachers that had an established rapport with colleagues were more committed to using DBQ Project units with their students because they felt supported by their peers. Similarly, teachers with supportive supervisors felt more compelled to transfer learning more so than those that did not.

Research Question 3: Extent of Professional Learning Intervention Influence

This action research study incorporated professional learning interventions into training design to influence the intent to transfer among social studies teachers. Interventions that aligned to the theory of planned behavior made the action research team intentional about addressing participant attitude and motivation, subjective norms, and perceived behavioral control. Goal setting intervention aligned to attitude or motivation. By having participants set specific and challenging goals for DBQ Implementation, the action research team hoped to insert participant motivation into training design. The self-management intervention aligned to the perceived behavior control component of the theory of planned behavior. During the self-management intervention, each teacher listed up to three barriers that would prevent them from using the DBQ Project when they returned to school. They also listed potential solutions to each barrier to hopefully make it more likely that they would overcome those barriers. The final

intervention was the classroom observation of teachers implementing a DBQ unit. The action research team invited local administrators to observe the classroom implementation as well.

Theme 1: Goal Setting Motivated Participants to Implement Training.

In seven out of eight cases, goal setting motivated participants to transfer learning into their classrooms. The goals were specific, challenging, and time bound. All teachers viewed goal setting as a positive practice. Having a named goal helped to have something to aim towards.
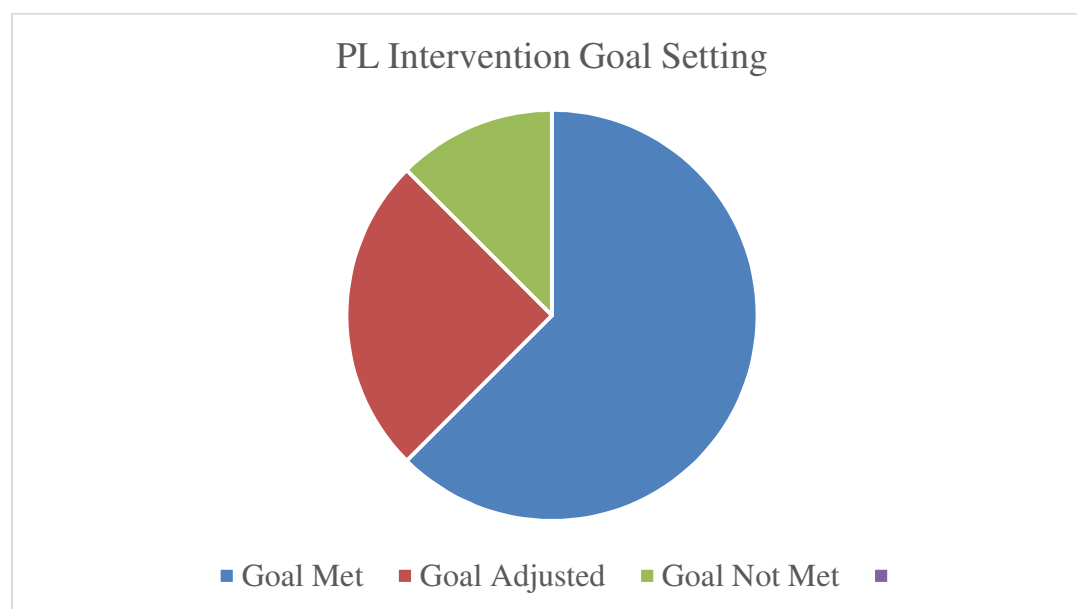
Figure 10. PL intervention and goal setting

Chandra mentioned being inundated with so many responsibilities that having made a public goal helped her to remember it,

> *It was good to state a goal because if I wouldn't have written it down I probably would forget about it.*

Even teachers that were facing the pressures of state assessment remarked that setting a goal for implementation during training was helpful. Eric shared:

> *I think setting a goal influenced me doing it because I think if I did not set that goal I would not have done it because… you know, we're so EOC focused and so, we have to*

make sure we set these little increments where we could get things that we want to get

done and that's one that I wanted to get done

In five of the eight cases, the teachers met their goal exactly. Teachers adjusted their stated goal in two of the eight cases (Figure 10). They adjustment called for them to change the DBQ unit because of where they were in the curriculum at the time of the scheduled classroom observation.

In one scenario, however, William was unsuccessful and cited that the goal setting did not influence his transfer at all. He felt overwhelmed by his teaching schedule and could not attempt to transfer during the data collection period.

I didn't achieve that goal. I didn't achieve my goal of doing one with all classes. Setting

the goal did not help. I really think I have too much going on at the same time. And this

class is a 9-week course. Once I got my head around the mini-semester it was just about

over.

Theme 2: Identifying Perceived Barriers Helped Participants Prepare for Implementation

Each of the nine participants were given time during the professional learning intervention to list potential barriers to transfer DBQ Project into their classrooms (Figure 11). Some teachers listed physical barriers such as space and the number of students while others listed student ability as a perceived barrier. Every teacher listed time as the main barrier to transfer. Social studies teachers teach new content to students in every high school course. It is common for secondary social studies teachers to feel pressure to cram centuries of history into a semester or year. That pressure causes teachers to rely on whole group, lecture-based teaching strategies in an effort to teach it all. Student engagement and achievement suffers as a result.
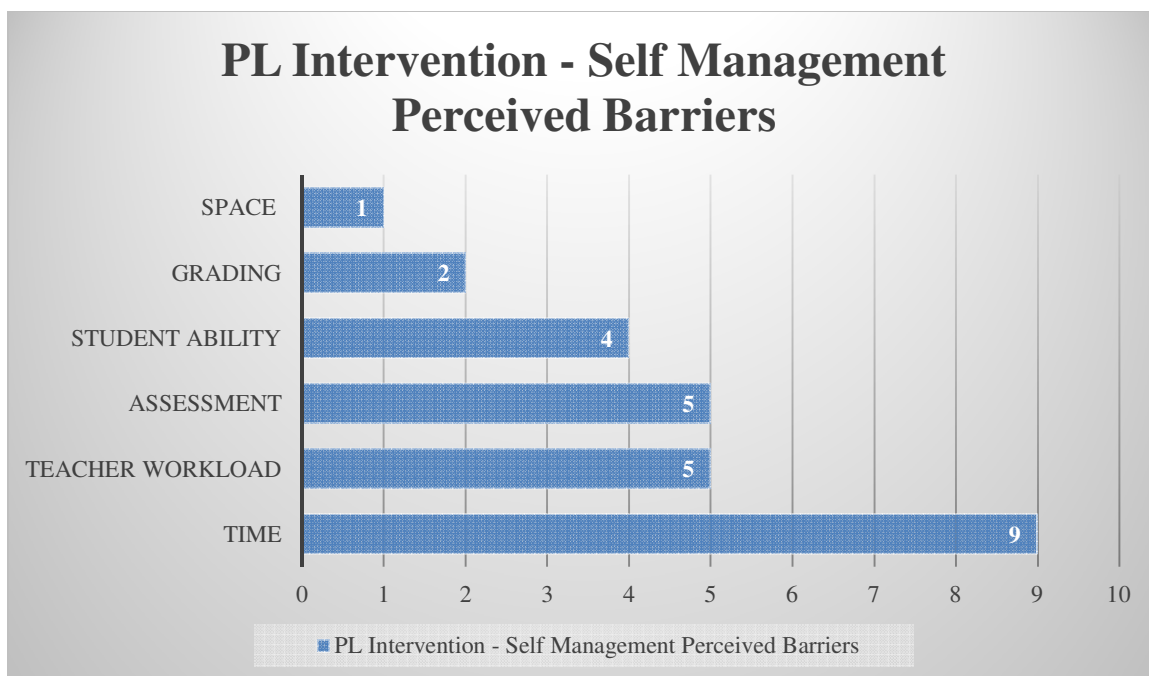
Figure 11. Perceived barriers of the PL intervention.

Overall, teachers noted a plethora of workload barriers that they felt were out of their control. From state assessment to adjusting to the new curriculum, teachers also noted all of the unknowns that seem to come up between attending a district training and planning to use it. Allison shared,

> *Sometimes a lot of other factors start coming in during the time you have the training and the time you're actually implementing the training and by then it's kind of in the past, you know, you got all this other stuff in between because there's so much coming at us all the time, you know, and always quickly and it's all different and I'm trying to keep it all straight and although I did the harder it is to multitask so it was kind of like I've made this commitment and I wanted to get this done and I did go ahead and do it but things would start getting in the way and in fact, that is what happened.*

The time barrier was on the top of every list of barriers. As stated earlier, the economics teachers feel a great deal of pressure to teach every standard and element before the state

assessment period. The world geography teachers felt pressure simply because their course is a half credit course. The students are supposed to master world geography concepts in nine weeks. Leslie acknowledged that something would have to be deleted in order to implement a DBQ unit:

DBQ is a great program. It is exactly what our kids need to be able to do but it will take a lot of time. I will have to give up a lot. It's not like the curriculum is going to stop just because I want to try something new. Something will not get taught if I do the DBQ unit.

Listing barriers ahead of time helped teachers face them head on. In some cases, what they perceived to be a barrier was actually resolved during the planning process. Chandra noted that naming her space issue made her think it through ahead of time. She stated,

Yeah, I think it helped to list the barriers because I was able to kind of set the class up in like a mini-debate.

Having the teachers talk about their perceived barriers added a surprising bonus. They began to help each other develop possible solutions. The mix of experienced DBQ teachers with novice teachers helped the conversation as well. David, a veteran DBQ teacher, was helpful when a few teachers discussed the time issue for block scheduled schools. The other teachers appreciated the peer support that was happening within the professional learning intervention. Leslie noted,

I was talking to David at the training and he gave me some pointers on how to organize the unit for my schedule. He shared what he does with his kids. The kids could do some of it at home that wouldn't take away from the process.

Another solution to participant concern over grading was offered during self-management intervention. David shared his solution to overcoming a grading barrier,

I only do one that I personally grade per semester but I try to do two. The first one I

had them peer review and introduce them to the rubric and then a second one I

grade using the same program. That way they're doing the whole process twice but it's

not like burning me down with millions of essays to grade.

Eric had a similar barrier with the essay-grading. His solution was to enlist support of the English Language Arts department.

The writing piece was a barrier, however, there was to it so of course. They don't like to

write. As I explained it to them, I gave them an outline, "Guys this is what you need to

do in order to have a nice essay." I was able to overcome that barrier. They were able

to write their essay. I read all the essays. I actually had the English department to do

those essays because I want to make my students better writers and so, I was able to

overcome that barrier.

Theme 3: Prescheduled Observations Encouraged Transfer

The team found that prescheduled classroom observations encouraged participants to transfer district learning into their classroom. The design team conducted classroom observations for eight of the nine teachers. One teacher, Allison, completed her DBQ implementation sooner than anticipated. In each scheduled observation, we invited the principal or assistant principal to participate in the observation. The local administration was unavailable in most cases due to scheduling conflicts. The prescheduled observations were an intervention in itself. The theory of planned behavior considers subjective norms as an influence on behavior intentions. Subjective norms include social pressure from supervisors and peers. Action research team members and local administrators represented the social pressure that can influence teachers transfer. During several face-to-face interviews, teachers admitted that they were committed to implementing

DBQ Project units simply because they knew we were coming to monitor their attempt at transfer. Allison was probably the most direct,

> *The reason that I did the DBQ…what drove me, in all honesty, is that you were*
>
> *depending on me to do it. I didn't want to let you down.*

Summary Findings on Research Question 3

Research question three sought to explore the extent to which learning and transfer were influenced by professional learning interventions. Goal setting and self-management interventions proved to have a positive effect on teacher intention to transfer. Goal setting helped to motivate teachers to meet the specific, challenging, and time-bound goals for implementation. Listing perceived barriers and possible solutions helped teachers to overcome much of what they thought was outside of their control. Some barriers, such as student low-reading levels, ended up not being a barrier at all. Finally, being dogmatic about classroom observations of transfer influenced teacher determination to implement DBQ Project units in their classrooms.

Research Question 4: Action Research Team Learning about Transfer

Theme 1: Professional Learning that Plans for Transfer Encourages Transfer

Prior to this study, the action research design team made assumptions about teacher intentions to change their behavior after attending district training. We presumed that teachers would use what they learned because we believed the training was good information to move the district towards its overall goals of student engagement and student achievement. We learned that transfer intentions are more likely when designers incorporate opportunity for participants to think through their implementation goals and barriers. Intentionality, then, must be a part of the design process. Professional learning that plans for transfer will encourage teachers to transfer.

In this study, transfer was more likely to occur when the intervention team members set goals and considered how they would overcome potential barriers. Spending time during the training to set a challenging, specific, and time-bound goal made most of the intervention team members want to meet their goals. Secondly, discussing perceived barriers in a group setting was advantageous because the intervention team members were able to help each other develop solutions to many of those barriers. This process again affirmed the potency of subjective norms of the theory of planned behavior. Social pressure from peers during the training intervention helped participants think through barriers and influenced training intentions. As an action research team, we realized that dedicating time to set goals and consider barriers during training will be time well spent in the future.

Theme 2: Training Plans Should Not be Made in Isolation

The action research design team was comprised of district leaders who support social studies teachers in some capacity. Social studies courses have had the least amount of state and district assessment and accountability pressure. For this reason, we began the study believing transfer is not realized for social studies teachers because they are held accountable less often than their peers in English language arts, mathematics, and science.

The team learned that the content area had little influence over transfer intentions. The lack of monitoring from a supervisor was an issue for some, but other unforeseen barriers took precedent. These barriers included new state social studies standards, a new district curriculum, a new district lesson planning template, and a new one-to-one digital initiative. DBQ training transfer suffered because there were too many other large-scale initiatives competing for the participants' attention. Cross-departmental planning is imperative for more successful transfer in the future. The action research findings suggest that aligning DBQ training to any of the new

initiatives this year would have made transfer intentions easier and perhaps more meaningful for the intervention team.

Summary

This action research study within the Curriculum and Instruction office at Kenbrooke School District provided evidence of secondary social studies teachers' intentions toward transfer of district training. The study findings related to design, motivation, and work environment and the impact of action research in designing district training for transfer. It was found that intent to transfer is aided by training design that includes elements of the theory of planned behavior such as goal setting, self-management, and observations.

As evidenced by the literature and findings from this study, teacher attitude and peer and supervisor support are critical to behavior intentions. At the onset of this study, the action research team felt immobilized by participant motivation and work environment variables. Training design was the lone variable that we knew we could manipulate to potentially improve transfer. Adopting the theory of planned behavior provided an opportunity to expand training design to include participant motivation and work environment. Participants overwhelmingly reported setting a specific, challenging, and time-bound goal motivated them to initiate transfer. Self-management training provided an opportunity for teachers to name their perceived barriers and plan for them prior to leaving training. Finally, prescheduled classroom observations with action research team members and local administrators also encouraged transfer among the teachers. These interventions proved to influence transfer intent. Yet, there were barriers that were beyond teacher control. Competing district and school agendas created barriers that the post-training interventions could not overcome.

These findings reveal that training design can address participant motivation, perceived behavioral control and subjective norms (work environment). The findings also revealed that training designers must be more strategic about the content and timing on training content in the first place. Finally, the study documented how action research methodology was an approach for capacity building among action research team members. We were able to recognize that collectively, we had a responsibility to plan training for social studies teachers that complimented other district goals and to allow teachers time to develop personal goals and strategies for transfer. This finding in particular responds to previous calls for transfer research that considers the lived experiences of the trainee and their work context (Baldwin et al., 2017).

This case study documented evidence of practice and theory that support transfer intent in a secondary social studies context. Collectively, the findings advance our knowledge transfer and provide insight on the role that training designers play to make transfer more obtainable for teachers in Kenbrooke School District. In the next chapter, I will provide conclusions derived from these findings and offer recommendations for practice, theory, and future research.

CHAPTER 6

SUMMARY, CONCLUSIONS, AND IMPLICATIONS

The purpose of this study was to investigate how training design interventions can influence teacher intention to transfer new behaviors into the classroom. Training transfer refers to the extent to which trainees apply new knowledge or skills after participation in professional development training. Through this study, the action research team sought to understand how we could increase transfer intent by incorporating interventions aligned to the theory of planned behavior. The four research questions guiding this study were: (a) how do action research team members currently design district-level social studies training? (b) what are the perceived levels of learning and training transfer for study participants in their classrooms? (c) are social studies teachers' learning and transfer influenced by professional learning interventions? If so, to what extent?, and (d) what is learned by the action research team regarding training design and transfer theory? This chapter draws from the findings presented previously from the action research study on transfer through training design. A summary of these findings is followed by major conclusions and implications for district level administrators. The conclusions are discussed in further detail and implications explored. Finally, recommendations for future research are presented.

Summary of Findings

This was an action research study in Kenbrooke School District (KSD), a large, public school system in the southeastern United States. The action research team was a multi-departmental group of district coordinators, professional learning facilitators, and new teacher

support specialists within KSD exploring teacher learning and teacher intent to transfer what is learned in a district training. The action research process led to the development of a thoughtful framework based on post training interventions inspired by the theory of planned behavior. The action research team merged the theory of planned behavior with the training design component of the transfer theory to give participants an opportunity to modify their attitude and address their subjective norms, and perceived behavioral control of their work environment. The post training interventions included goal setting, self-management training, and classroom observations. Goal setting is based on the work of Locke and Latham (1990). Goals that are challenging, specific and time bound have proven to influence behavior more often than goals that are easy and broad. During self-management training, based on the work of Frayne and Geringer (2000), participants identified perceived barriers and created possible solutions to those barriers. Finally, the action research team engaged supervisors and peers during classroom observations.

Data from the LTSI, classroom observations, and participant interviews revealed three main conclusions about this study. The conclusions will be discussed below along with implications for school and district leaders. Finally, the chapter will conclude with suggestions for future research.

Conclusions

Conclusion 1: Training design should include an opportunity for teachers to personally plan for implementation in the classroom. Action research design team members acknowledged a disconnect in their ability to control transfer in teachers after they return to the classroom. Sixty-seven percent of the team relied on the local administration to monitor implementation while also realizing that their influence over local administrator priorities for monitoring was small. The unspoken hierarchy of content areas compounded the issue as school

leaders were more focused on English Language Arts, mathematics, and science due to state assessments and STEM learning.

Realizing that we could not control the unwritten hierarchy of content areas, we agreed that any good district training that is aligned to andragogical principles was a sound approach to increase the likelihood of transfer among teachers. Knowles (1984) posited that adults learn best when: (a) they are involved in the planning and evaluation of their learning, (b) the learning is based on experiences, (c) the learning is immediately relevant, and (d) the learning is problem-centered. The DBQ Project training met at least three of the four andragogical principles. Secondary world geography and economics teachers were allowed to experience the DBQ units as a student, the content of the DBQ unit was relevant and aligned to state standards, and the national C3 Framework for social studies and the DBQ units sought to address of the problem of inquiry, critical thinking, and writing among students. The first andragogical principle, involving teachers in the planning and evaluation of the DBQ training occurred to some degree. Action research design team members used teacher feedback and observations to plan training but the evaluation of learning and transfer fall short.

Using the work of Baldwin and Ford (1988) as the initial basis for this study, the action research team learned that training design, participant motivation, and work environment characteristics have influence over transfer. With a focus on training design, we began to look for ways to incorporate work environment factors and participant motivation in training. Upon doing more research, we found the theory of planned behavior to be a viable theory to support our efforts to effect participant motivation and address work environment factors through post training interventions (Yan & Sin, 2014; Cheng, 2016).

Data from the LTSI and participant interviews confirmed that the goal setting and self-management interventions had a positive effect on teacher transfer intentions. Teachers felt that setting a public, challenging, time-bound, and specific goal helped to keep the training implementation in the forefront of their minds when they returned to their classrooms. David shared,

> *I think setting the goal and having a time limit made me do it. I would've done one eventually because I really like the process but I probably would've made it to next semester more just because the DBQs on economics deal more with macro and I haven't covered macro yet with them but because I set that goal I found one that would fit with microeconomics because this one did but the subsidies and it actually the students really liked it! It definitely made it faster for me to make it happen than it would have happened if I didn't set the goal.*

Making a short list of perceived barriers during self-management intervention also helped them to identify what they believed would keep them from implementing DBQ in their classrooms. The teachers also identified ways to overcome those barriers during the intervention. Participants reported that some of their perceived barriers were not as profound as they anticipated during the post training intervention. Further, naming the perceived barriers during training allowed them to prepare for implementation in a more realistic way. Allison, a world geography teacher who was hesitant about adding the training to her classroom, shared how naming her barriers helped to set her up for implementation:

> *I've been to trainings before and I'm gung-ho at the time but coming back to school I always feel flustered. There are so many things coming at me from the time I hit the mail room. The principal needs something, too many students are absent, there's advisement,*

you know the list goes on. Sitting there listing out what I thought would keep me from

using DBQ and then taking the time to plan solutions to those barriers was helpful. I

liked thinking about my solutions with other people. They had some really good ideas!

Some of the barriers, turned out to not be that bad at all. I think I just never planned for

the bumps before.

In this study, the post training interventions that occurred immediately after district

training supported teacher transfer intentions among secondary social studies teachers in

Kenbrooke School District. Asking the intervention team to set challenging goals and specific

barriers and solutions to those barriers improved teacher intent to use DBQ Project training in

their classrooms. This practice of goal setting and self-management care was new to the action

research design team. It forced participants to take personal ownership of their learning and

transfer.

Conclusion 2: Supervisor and peer support during implementation is directly

related to the intentions to transfer district training. Based on this study, it can be concluded

that subjective norms of the theory of planned behavior had a direct influence on participants in

this study. Action research design team members established that our influence over school

leader priorities is minimal. Team members also acknowledged that district training focused on

social studies content historically enjoyed less support due to the lack of leverage the courses

provide during state assessment and accountability measures. This implicit hierarchy among

content areas makes access to school leaders difficult at times in the Kenbrooke School District.

Yet, in the case of this study, participants responded favorably to a correlation between

their intent to transfer district training and how often they either spoke with their peers and

supervisors about the district training. Intention to transfer was strong in places where

communication about teaching innovation was common. Teachers that were personally excited (motivation) immediately shared their learning with peers. Eric worked in a co-taught economics class. He shared evidence of his personal excitement with his new learning by sharing what he learned with his co-teacher,

> *My co-teacher and I share responsibility for our students. I mean, I work with her on content and she helps me with strategies to support our students with special needs. So naturally, I wanted to make sure she was comfortable with the DBQ training. She was going to need to buy-in before our students could try these techniques. And she was just as motivated as I was, you know. It's good to have a colleague that shares your enthusiasm. Makes you want to try something new even more.*

Intention to transfer was less intense in cases where the peer and supervisor support was minimum. William was the teacher that did not meet his goal to implement a DBQ unit by the end of our data collection period. William also maintains not having much interaction with the local administrators or peers about district training.

> *No. Department chair, yes but academic coach or assistant principal or principal, no. Generally, I don't see the administration unless something needs to be addressed or something has gone wrong and my assistant principal is fantastic in that she trusts me to do the things that I'm supposed to do and if I don't then maybe I'll get an email, maybe she'll stop in the hall, or we'll talk for maybe a couple of minutes and then it will be very clear that, you know, she expects something different than what was happening but no. No, no. No one's asked me about the DBQ training. No one's asked me about the curriculum writing that I'm taking part of. Nobody's had any conversation with me at all.*

For others, attending a district training and developing next steps was a department activity, giving an indication that at least peers and department chairs acted as supervisors by setting an expectation for re-delivery of learning once the district training was over. In Chandra's department, they predetermine the value of the district training and then make a plan of action. She shared,

> *...if it is something that is beneficial and our department chair says, "Hey, you want to go? Can you come back and redeliver?" In cases like that, we have a dedicated department meeting for everyone to learn what is being re-delivered.*

Finally, action research team classroom observation intervention influenced teacher intentions to transfer. We invited the principals to observe teacher transfer along with the action research team but they were not available due to scheduling conflicts. For participants, the action researchers acted as a supervisor and encouraged them to be prepared for the scheduled classroom observation. In many cases, participants shared their commitment to try the training was stronger because they knew we were coming to observe. Allison was severely overwhelmed with personal issues and all of the new initiatives coming from the district office. She admitted that in ordinary circumstances she would have put the DBQ unit away but felt compelled to implement it because she knew I was coming to observe,

> *I didn't want to let you down. I was tired and irritated but I knew you and your team were coming.*

Further, peer relationships proved to be as valuable during post training interventions as they are in the schools. During self-management training, participants listed and discussed their perceived barriers with action research team members. Participants within the group immediately shared ideas to help teachers overcome their barriers. David, the economics teacher with a

wealth of experience with implementing DBQ units, was particularly helpful. Marcus expressed an increase in confidence when David gave him some implementation pointers during the training. Eric stated,

> *I was talking to one of the gentlemen at training and he gave me some pointers on what to do and what they could do at home that wouldn't take away from the process and so, some of his ideas helped me realize that trying the DBQ wouldn't be so bad.*

Conclusion 3: Action research as a method of inquiry encouraged collaboration and supported steps toward systemic change for district professional learning. In this study, the action research team was comprised of two Curriculum and Instruction coordinators, two professional learning facilitators, and two teachers serving as district support for new teachers. Working together allowed the team to consider the challenges of training design and transfer from multiple perspectives. As a team we realized that we made assumptions about training transfer among social studies teachers. Although we knew that local leaders were less likely to monitor social studies teaching and learning as often as they monitored other subjects, we still believed that local leaders held the keys to transfer after participants returned to the classrooms. Through a collaborative process, the action research team identified post training interventions that would encourage transfer through the lens of the theory of planned behavior. As a team we conducted post training interventions, observed classrooms, collected survey data, and analyzed interview data. These activities led to significant growth at the individual, team, and organizational level.

At the individual level, we all grew professionally and academically as we learned about several theories that impact adult learners and their behavioral intentions. This learning will be

valuable to each of us as we continue to work with adult learners in the field of education. Ms. Williams shared how the action research team impacted her:

> *I have learned so much about how adults make decisions about what they will and will not take into their classrooms from my trainings. I always left that decision up to them and maybe their principal but now I see how I can plan to do more during a training to make the behavior change more likely.*

On the team level, we realized that putting a lot of effort into planning and implementing training was not enough. We needed to discuss theories and best practices together to bring about systemic change in our organization. We considered an abundance of theories, including andragogy, transfer, goal setting, relapse prevention, and the theory of planned behavior. Through the development of the conceptual framework that adopted theory-based post training interventions, the team became a community of learners that action research is intended to create.

Finally, team learning about training design and transfer is poised to strengthen professional learning techniques for the organization. As district leaders, we are tasked with providing relevant and effective professional learning and with being good stewards over public funds. The findings from this action research study will help the organization approach professional learning differently as we seek to not only have participants learn new content but to also strengthen participant intent to transfer learning into the classroom.

Implications

This is an action research case study, conducted within the specific context of Kenbrooke School District, and, as such, the findings and conclusions have limited validity for extrapolation. However, there are potential implications for practice for the local and district levels, as well as recommendations for future research in the field of transfer.

School Leadership

Subjective norms, pressure from peers and supervisors, had a significant impact on teacher intentions to transfer district learning into their classrooms. Supervisors and peers are considered to be a part of the work environment of the transfer theory (Baldwin & Ford, 1988). Many of the action research team members served in district level administrative roles. Although building principals were not available to attend classroom observations of DBQ implementation, many teachers reported that their intentions to transfer district learning was directly tied to knowing that they would be monitored by action research team members. Social studies teachers were motivated to transfer because someone they perceived to be in a supervisory position was coming to monitor them.

Further, teachers who enjoyed consistent communication and support from peers and supervisors reported greater motivation to transfer district learning. Departments with strong rituals for communication produced teachers that were more willing to talk about their learning with their peers and to try implementation in their classrooms. Schools with campus-wide initiatives produced teachers that were motivated to implement district training because it was aligned to the goals of the school. Schools therefore play a role in aiding teacher motivation to utilize district training by creating a work environment that is fertile for professional growth.

District Leadership

The implication for district leadership is two-fold. First, district initiatives and department-based professional learning should complement each other. Teacher intention to transfer DBQ Project training was threatened by the number of conflicting district initiatives that teachers faced this year. Transfer of training fell in priority for teachers because they were bombarded with several mandates from other departments. These mandates included new

laptops for all teachers and students, new curriculum, new standards, and a new lesson planning template. Any one of those required initiatives would have been enough to make teachers put new district training on hold. The lack of district communication about these non-negotiable initatives put DBQ Project training at a disadvantage.   As district coordinators, the action research team would have served the teachers better if we would have planned to align DBQ Project training to these new district mandates.

Relatedly, the action research team realized that larger districts with multiple layers of leadership need to make a concerted effort to support collaboration between departments. The action research team represented three departments and two school settings. During the first meetings we realized that were all in search of a way to influence transfer in social studies teachers. The collaboration afforded by the action research environment was beneficial to the team. We forged new partnerships and look forward to continuing the work of expanding training design to improve transfer.

Theory

Baldwin et al. (2017) challenged transfer researchers to deepen their understanding of transfer by devoting more research to the "trainer, trainee, and organizational contexts under study" (Baldwin et al., 2017, p. 17). They advocate for a more personal approach to studying transfer intentions and transfer. Action research allowed both the design team and the intervention team to think about our lived experiences within the context of Kenbrooke School District.

Transfer theory was the initial theoretical framework for this study. Baldwin and Ford (1988) identified three conditions for transfer: participant motivation, training design, and work environment. Survey data from the LTSI confirmed that motivation was high among the

participants at the conclusion of the training. The perceived opportunity to use training and support from peers represent aspects of the work environment that also scored high on the survey. Finally, data from the LTSI also confirmed training design and content were supportive of transfer among the teachers.

Data from the post training interventions supported the theory of planned behavior (Ajzen, 1991). Goal setting and self-management interventions helped improve teacher motivation to transfer. Teacher attitude was influenced by a time bound, challenging, and specific declaration of a public goal. Teachers addressed their perceived behavioral control by listing their perceived barriers and working as a team to create strategies to overcome those barriers. Classroom observations with action research team members taking on the perceived role of a supervisor aligned to the subjective norms, or social pressure from peers and supervisors to improve behavior intentions.

Reflections on Conceptual Framework

The action research conceptual framework began with the shared problem of encouraging teachers to use district training in their classroom. The team engaged with the literature to understand the problem of transfer intentions in secondary social studies teachers. The conceptual framework was developed over time. The team assessed current design practices and decided that we needed to extend district training design to include interventions that would inform participant motivation and work environment variables. Bi-monthly meetings and informal conversations with the design team and intervention team deepened the development of the conceptual framework. The design team found action research to be beneficial and is committed to including of post training interventions as an extension of training design with future district training.

Researcher Self Reflection

Upon being introduced to action research, I knew I wanted to study a problem that would benefit me personally as a professional and my organization as a whole. There were several problems to consider in my large, urban school district. I chose to further my work in inquiry with social studies teachers. Inquiry as a teaching practice was not new to social studies teachers but it was a shift in teaching that was not yet ingrained in classrooms. Action research encouraged me to reach out to colleagues who shared my same concerns. According to Bloomberg and Volpe (2012), "action research focuses on specific situations that people encounter by engaging them in collaborative relationships and working on developing localized solutions" (p. 51). Our action research team built a supportive relationship around the challenge of transfer among social studies teachers. The work was challenging. Few members of the team worked in the same building or department. The design team and the intervention team together represented seven school sites and 3 district departments. Managing schedules and keeping each other accountable to the research team work was difficult at times. Bi-monthly meetings were scheduled far in advance but several meetings had to be re-scheduled. Flexibility was key as the team work progressed.

Finally, action research stimulated my growth as a professional. Typically, I think about problem solving on my own. Action research led me to build trust in a team of professionals and to develop a systematic approach to solving real problems in my profession. It was not easy for me to let go of the control of my research, but through this process, I gained partners with the same mission to improve social studies professional learning and teacher intentions to transfer.

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Appendix A IRB Approval

The University of Georgia

Phone 706-542-3199

Office of the Vice President for Research
Institutional Review Board

APPROVAL OF PROTOCOL

May 24, 2017

Dear Mrs. Karen Bryant:

On 5/24/2017, the IRB reviewed the following submission:

Type of Review:	Initial Study
Review Category:	Exempt 1 and 2
Title of Study:	Transfer: Investigating design factors that influence teacher behavior changes in a social studies classroom.
Investigator:	Karen Bryant
Student Co-Investigator:	Kimberlynn Weston
IRB ID:	STUDY00004714
Funding:	None
Documents Reviewed:	Recruitment Material, Consent Document, External Site Authorization, Interview Guides and Assessments, Observation Guide

The IRB approved the protocol from 5/24/2017 to 5/23/2022.

In conducting this study, you are required to follow the requirements listed in the Investigator Manual (HRP-103).

Sincerely,

Dr. Gerald E. Crites, MD, MEd
University of Georgia
Institutional Review Board Chairperson

310 East Campus Rd, Tucker Hall Room 212 • Athens, Georgia 30602
An Equal Opportunity/Affirmative Action Institution

Appendix B LTSI Survey

LEARNING TRANSFER SYSTEM INVENTORY

Please circle the number (1, 2, 3, 4 or 5) to the right of each item that most closely reflects your opinion about training.

| 1 - Strongly disagree   2 - Disagree   3 - Neither agree nor disagree |
| 4 - Agree   5 - Strongly agree |

For the following items, please think about THIS SPECIFIC TRAINING PROGRAM:

1.	Prior to this training, I knew how the program was supposed to affect my performance.	1	2	3	4	5
2.	This training will increase my personal productivity.	1	2	3	4	5
3.	When I leave this training, I can't wait to get back to work to try what I learned.	1	2	3	4	5
4.	I believe this training will help me do my current job better.	1	2	3	4	5
5.	Successfully using this training will help me get a salary increase.	1	2	3	4	5
6.	If I use this training I am more likely to be rewarded.	1	2	3	4	5
7.	I am likely to receive some recognition if I use my newly learned skills on the job.	1	2	3	4	5
8.	Before this training, I had a good understanding of how it would fit my job-related development.	1	2	3	4	5
9.	I knew what to expect from this training before it began.	1	2	3	4	5
10.	I don't have time to try to use this training on my job.	1	2	3	4	5
11.	Trying to use this training will take too much energy away from my other work.	1	2	3	4	5
12.	Employees in this organization will be penalized for not using what they have learned in this training.	1	2	3	4	5
13.	I will be able to try out this training on my job.	1	2	3	4	5
14.	There is too much happening at work right now for me to try to use this training.	1	2	3	4	5
15.	If I do not use new techniques taught in this training I will be reprimanded.	1	2	3	4	5
16.	If I do not utilize this training I will be cautioned about it.	1	2	3	4	5

Please turn to the next page

1 - Strongly disagree	2 - Disagree	3 - Neither agree nor disagree
4 - Agree	5 - Strongly agree	

		1	2	3	4	5
17.	The resources needed to use what I learned in this training will be available to me.	1	2	3	4	5
18.	My colleagues will appreciate my using the new skills I learned in this training.	1	2	3	4	5
19.	My colleagues will encourage me to use the skills I have learned in this training	1	2	3	4	5
20.	At work, my colleagues will expect me to use what I learned in this training.	1	2	3	4	5
21.	My supervisor will meet with me regularly to work on problems I may be having in trying to use this training.	1	2	3	4	5
22.	My supervisor will meet with me to discuss ways to apply this training on the job.	1	2	3	4	5
23.	My supervisor will oppose the use of techniques I learned in this training.	1	2	3	4	5
24.	My supervisor will think I am being less effective when I use the techniques taught in this training.	1	2	3	4	5
25.	My supervisor will probably criticize this training when I get back to the job.	1	2	3	4	5
26.	My supervisor will help me set realistic goals for job performance based on my training.	1	2	3	4	5
27.	The instructional aids (equipment, illustrations, etc.) used in this training are very similar to real things I use on the job.	1	2	3	4	5
28.	The methods used in this training are very similar to how we do it on the job.	1	2	3	4	5
29.	I like the way this training seems so much like my job.	1	2	3	4	5
30.	It is clear to me that the people conducting this training understand how I will use what I learn.	1	2	3	4	5
31.	The trainer(s) used lots of examples that showed me how I could use my learning on the job.	1	2	3	4	5
32.	The way the trainer(s) taught the material made me feel more confident I could apply it in my job.	1	2	3	4	5
33.	I will get opportunities to use this training on my job.	1	2	3	4	5
	Please turn to the next page					

Please complete questions 34 - 48 below.
Note that these items have new instructions.
Please read them carefully.

| 1 - Strongly disagree   2 - Disagree   3 - Neither agree nor disagree |
| 4 - Agree   5 - Strongly agree |

For the following items, please THINK ABOUT TRAINING IN GENERAL in your organization.

34.	My job performance improves when I use new things that I have learned.	1 2 3 4 5
35.	The harder I work at learning, the better I do my job.	1 2 3 4 5
36.	For the most part, the people who get rewarded around here are the ones that do something to deserve it.	1 2 3 4 5
37.	When I do things to improve my performance, good things happen to me.	1 2 3 4 5
38.	The more training I apply on my job, the better I do my job.	1 2 3 4 5
39.	My job is ideal for someone who likes to get rewarded when they do something really good.	1 2 3 4 5
40.	Experienced employees in my group ridicule others when they use techniques they learn in training.	1 2 3 4 5
41.	People in my group are not willing to put in the effort to change the way things are done.	1 2 3 4 5
42.	My workgroup is reluctant to try new ways of doing things.	1 2 3 4 5
43.	People often make suggestions about how I can improve my job performance.	1 2 3 4 5
44.	I get a lot of advice from others about how to do my job better.	1 2 3 4 5
45.	I never doubt my ability to use newly learned skills on the job.	1 2 3 4 5
46.	I am sure I can overcome obstacles on the job that hinder my use of new skills or knowledge.	1 2 3 4 5
47.	At work, I feel very confident using what I learned in training even in the face of difficult or taxing situations.	1 2 3 4 5
48.	People often tell me things to help me improve my job performance.	1 2 3 4 5

Please complete questions 49 - 55 on the following page.

49.	What was the TITLE of the training program you have just attended?	_____
50.	What was the LENGTH of the training program you have just attended? (tick the correct circle)	O Less than 1 day O 1 day O 2 days O 3 days O 4 days O 5 days O 6 days O 7 days O More than 7 days
51.	What is your gender?	O Female O Male
52.	What is your JOB TITLE?	_____
53.	Including this training, how many work-related training programs provided by this organization have you attended in the last 12 months?	O 1 program O 2 O 3 O 4 O 5 O 6 O 7 O 8 O 9 O 10 or more programs
54.	My main goal for engaging in this learning experience was . . . (check the one that best fits)	O Personal interest or growth O To develop job-related knowledge or skills O Required by employer O Needed for job-related certification O Preparation for job advancement
55.	What is your age?	O Less than 26 years of age O 26-35 O 36-45 O 46-55 O 56-65 O 66 years or older

Please go on to the next page for the last 3 questions.

56. Which of the following categories describes the industry in which your organization best fits? (check the one that best applies)

O Agriculture, Forestry, Fishing & Hunting	O Mining
O Utilities	O Construction
O Computer & Electronics Manufacturing	O Other Manufacturing
O Wholesale	O Retail
O Transportation & Warehousing	O Publishing
O Software	O Telecommunications
O Broadcasting	O Information Services & Data Processing
O Other Information Industry	O Finance & Insurance
O Real Estate (sales, rental, leasing)	O College, University, & Adult Education/Training
O Primary/Secondary (K-12) Education	O Other Education Industry
O Health Care	O Arts, Entertainment & Recreation
O Hotel and Food Services	O Government & Public Administration
O Legal Services	O Scientific or Technical Services
O Social Services/Social Assistance, Counseling	O Military
O Religious	O Other Industry

57. The organization you work for fits best in which of the following categories? (check the one that best applies)

O Public sector (e.g., government)
O Private sector (e.g., for-profit business)
O Not-for-profit/non-governmental
O Other _____

58. What is your organization's total budget for this year, from all sources? (give your best estimate)

O Less than $500,000 (US)
O $500,000 to $1 million (US)
O $1 million to $10 million (US)
O $10 million to $100 million (US)
O $100 million to $500 million (US)
O $500 million to $1 billion (US)
O Over $1 billion (US)
O Don't know

Thank you for taking the time to complete this survey.

Appendix C LTSI User's Agreement

Due to confidentiality agreements, I am not able to share the actual survey instrument. The

agreement is listed below.

Learning Transfer System Inventory (LTSI) User's Agreement

Permission is hereby granted to use the Learning Transfer System Inventory (LTSI), an organizational assessment instrument, owned by Reid A. Bates and Ed Holton. Permission is granted to the following people for the timeframe, and purposes specified below:

Permission granted to: (Name, company, address, phone number, e-mail, etc.)	Kimberlynn H. Weston University of Georgia 2713 Bailey Place NE Conyers GA 30013 404-403-0741 Khw87463@uga.edu
Purpose	Dissertation study. Title: Transfer: Investigating design factors that influence teacher behavior changes in a social studies classroom.
Time Period	August 2017 - May 2018
Other Conditions	Purchase of the LTSI is waived on the condition that the instrument is used for research purposes only and not for any grant, service or other activity for which the user receives a salary or monetary compensation. Otherwise purchase of the LTSI is required at a cost of U.S. $10.00 per copy.

It is understood that, by agreeing to use the Learning Transfer System Inventory, you are

accepting the following conditions:

1. Any use other than that specified above is prohibited without prior written authorization by the authors (R. A. Bates & E. F. Holton).

2. No changes whatsoever can be made to the LTSI without prior written consent of the authors.

3. The authors retain full copyright authority for the LTSI and any translations that are developed as a result of granting this permission. Every copy of the LTSI (paper or online) must carry the following copyright notice:

4. Discussion and presentation of the LTSI will accurately reflect the composition of the instrument and will use only original scale names and scale definitions.

5. In order to protect the proprietary nature of the LTSI neither item groupings nor scale scoring formulas will not be provided to users.

6. Users of the LTSI may not publish or otherwise disseminate into the public domain the survey items. This means the items or item groupings may NOT be included in thesis or dissertation documents unless authorized by the authors.

7. If the LTSI is to be translated into a new language as part of this project, the authors of the LTSI must be included in the translation process as per their supplemental instructions.

8. If one or both of the authors of the LTSI contribute in a meaningful way to data analysis or collection, conceptualizing a study, contributing to the writing of a manuscript or make any other substantive contributions to a manuscript submitted for publication then it is agreed that the contributing LTSI author will be included as a co-author on that manuscript.

9. A copy of all data collected with the instrument must be given to the authors free of charge and in a timely manner. This data will only be used for research purposes and will not be reported in such a manner that would identify individual organizations, without written permission of the organization.

10. The authors reserve the right to withdraw the LTSI from use at any time if any terms or conditions of this agreement are violated.

    Il. By signing this agreement, LTSI users acknowledge that the scoring algorithms will be

    retained by the authors and that the data collected with the LTSI must be submitted to the

    authors for scoring.

A copy of this Permission Agreement should be signed and returned to indicate your agreement

with the above restrictions and conditions. A fully executed copy will be returned to you for

your records. Upon receipt of the signed agreement and payment of any applicable

royalty/license fee you will be sent a copy of the LTSI that you may reproduce.

LTSI user (print name)	Kimberlynn H. Weston
Title	Ed.D. candidate, University of Georgia
LTSI user signature	Date 8/27/17
Reid Bates or Elwood F. Holton Ill, LTSI authors	Date

Appendix D Study Participant Invitation

University of Georgia

Transfer: Investigating design factors that influence teacher behavior changes in a social studies

classroom

Volunteers Wanted for a Research Study

This research study will investigate training design factors that may influence how teachers transfer learning into their classrooms. Study participants must have attended the DBQ Project training for world geography and economics teachers on September 19, 2017. Volunteers can expect to participate in the following:

- one training intervention workshop
- one Likert survey
- one classroom observation
- one face-to-face interview

This study will occur from September 2017 until January 2018. Participation is anonymous and confidential. Participants will receive PLU credits for joining this study.
To learn more about this research opportunity, please contact Kimberlynn Weston at khw87463@uga.edu or 404-403-0741.

Principal Investigator: *Karen Bryant*

Department of Lifelong Education, Administration, & Policy

bryantkc@uga.edu

Student Co- Investigator: *Kimberlynn Weston*

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Appendix E C3 Framework Observation Tool

C3 FRAMEWORK DIMENSIONS DBQ Process alignment	OBSERVED ACTIONS
DIMENSION 1: Developing Questions and Planning Inquiries *Compelling questions* that focus on real social problems, issues, and curiosities about how the world works *Supporting questions* that scaffold students' investigations into the ideas and issues behind a compelling question. *DBQ step 1: Hooks/Connecting prior learning* *DBQ step 2: Build background knowledge* *DBQ step 3: Clarify question*	
DIMENSION 2: Applying disciplinary tools and concepts Conceptual content that defines the disciplines and builds content knowledge of civics, economics, geography, history, psychology, sociology and/or anthropology. *DBQ step 2: Build background knowledge* *DBQ step 3: Clarify question*	
DIMENSION 3: Evaluating sources and using evidence Opportunities to analyze a variety of source materials to support claims and counter-claims in order to construct accounts, explanations, and arguments. *DBQ step 4: Close Analysis of Documents* *DBQ step 5: Bucketing*	

DIMENSION 4: Communicating conclusions and taking informed action Promotes deliberation with others to define and communicate conclusions using problem solving and collaboration skills. Applies knowledge to real world problems to prepare students for college, career, and civic life. *DBQ step 6: Thrash Out/Writing*	
Overall impression of DBQ implementation:	

Appendix F Action Research Team Interview Questions

      1. Given your role in KSD, describe how you support social studies instruction?

      2. How do you currently design training for social studies teachers at KSD?

Appendix G Study Participant Interview Questions

1. Prior to the September 19 training, how comfortable were you with the College, Career, and Civic Life (C3) Framework?

2. Was the September 19 training your first workshop on document based questions?

3. How did goal setting intervention affect your desire to implement DBQ in your classroom?

4. What barriers to DBQ implementation did you identify during the self-management intervention?

5. What is the likelihood that you would have implemented DBQ without the goal setting and self-management interventions?

6. What were the key factors that contributed to the transfer of training into your classroom?

7. Which aspect of the actual training had the greatest impact on your ability to transfer the training into your classroom?

8. Is there anything that was missing from the training that would make the likelihood for transfer into your classroom greater?

Appendix H Action Research Team Follow-up questions

1. Prior to working on this project, how familiar were you with the concept of action research?

2. How do you anticipate using what you've learned about transfer at KSD with social studies teachers in the future?

3. What surprised you the most about participating in this project?

4. What will you do differently as a result of working on this project?

5. How did this action research project support your own professional growth?