

**Assessing the Transfer of Learning: A Qualitative Case Study on the Acceptance of
Knowledge from a Military Faculty Development Center**

by

Brent Conner Teague

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Approved by

Leslie Cordie, Chair, Associate Professor, Educational Foundations, Leadership, and
Technology

Johnathan Taylor, Professor, Educational Foundations, Leadership, and Technology

Jane Teel, Professor, Educational Foundations, Leadership, and Technology

Abstract

This qualitative case study explored training transfer among Military Instructors at the Marine Corps Faculty Development School, emphasizing training acceptance versus knowledge acquisition through a constructivist lens. Using semi-structured interviews conducted immediately post-training and six weeks later, the study examined how instructors perceived, accepted, and integrated training into their instructional practice (Merriam, 1998; Yin, 2018). Three concepts guided the analysis: training acceptance—instructors' perceptions of relevance and applicability (Burke & Hutchins, 2007; Ford et al., 2017); knowledge acquisition—the absorption of content and strategies (Baldwin & Ford, 1988; Illeris, 2009); and training material utilization—how materials were applied or adapted in practice (Biech, 2017; Schmidt, 2014). Data from interviews, observations, and curriculum reviews provided a rich understanding of learning transfer, reinforcing the value of constructivist principles in military faculty development and the broader goal of enhancing instructional effectiveness (Blume et al., 2009; Salas et al., 2012).

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LIST OF ACRONYMS AND ABBREVIATIONS

ALC – Army Learning Concept

ATD – Association for Talent Development

BOS – Basic Officer School

DoD – Department of Defense

FLC – Formal Learning Center

FLEX – Facilitating Learning Experiences

IRB – Institutional Review Board

JCS – Joint Chiefs of Staff

MCCLFD – Marine Corps Center for Learning and Faculty Development

MCDP – Marine Corps Doctrinal Publication

MOS – Military Occupational Specialty

NCO – Non-Commissioned Officer

OIC – Officer in Charge

SOP – Standard Operating Procedures

SNCO – Staff Non-Commissioned Officer

TECOM – Training and Education Command

USMC – United States Marine Corps

Chapter One: Introduction

Effective workforce training requires more than just delivering information; it demands a deeper understanding of how knowledge is accepted and applied in practical settings. Instructors can measure knowledge acquisition through assessment tools, but truly understanding the acceptance of that knowledge and its successful transfer to the workforce requires a more comprehensive evaluation of learner engagement, motivation, and real-world application (Salas et al., 2012). In military workforce training and development, organizations seeking to improve effectiveness, efficiency, and processes must navigate challenges related to time, funding, and resource management (Biech, 2017; Salas et al., 2012; Schmidt, 2014). Understanding, learning transfer, and military education are essential to observe this transfer of knowledge from the instructor to the workforce.

Learning is the process of acquiring knowledge, skills, attitudes, or behaviors through experience, study, or teaching (Illeris, 2009; Oladimeji, 2023; U.S. Marine Corps & Berger, 2020). This process involves absorbing information, understanding concepts, and applying them in new situations. Learning can occur in various ways, including formal education, personal experiences, social interactions, or self-directed study, and can happen intentionally or unintentionally. This process can be further broken down into different types of learning, including cognitive, behavioral, social, and experiential (Illeris, 2009; U.S. Marine Corps & Berger, 2020). Together, these approaches highlight the diverse ways people acquire and apply knowledge to enhance performance, drive innovation, and address challenges in various contexts, such as the workplace and society.

Transfer of learning occurs when knowledge or skills acquired in one context influence performance in another. Learning transfer refers to applying what has been learned in one situation to a different, often unfamiliar context (Baldwin & Ford, 1988; Burke & Hutchins, 2007; Perkins & Salomon, 1992). The concept of learning transfer is central to education, demonstrating how previous experiences can impact new challenges, initiatives, or processes. The transfer of learning enhances problem-solving, adaptability, and the ability to draw on past experiences to tackle novel tasks or challenges (Burke & Hutchins, 2007; Perkins & Salomon, 1992). Learning transfer occurs in various forms, including positive, negative, near, and far transfer, as well as low-road and high-road transfer, which differ in how automatically or deliberately knowledge is applied (Perkins & Salomon, 1992). Effective transfer of learning is essential in education, training, and real-world applications, enabling individuals to adapt and apply acquired knowledge in diverse and evolving situations. For example, in military education, a Marine trained in decision-making under simulated combat scenarios must effectively transfer those skills to high-pressure real-world missions, where quick thinking and adaptability can be the difference between success and failure. This ability to apply training across varied and unpredictable contexts is crucial for enhancing readiness, operational effectiveness, and overall mission success in the military.

Military education refers to formal training and instruction provided to individuals within the armed forces to prepare them for their roles, responsibilities, and leadership positions (Hampson & Taber, 2020; Schmidt, 2014). Military education covers a broad range of subjects, including tactics, strategy, leadership, ethics, and technical skills, all tailored to the specific needs of military personnel (Hampson & Taber, 2020; U.S. Marine

Corps & Berger, 2020). The primary goal of military education is to develop well-rounded personnel who can perform effectively in both peacetime and combat situations (U.S. Marine Corps & Berger, 2020; Schmidt, 2014). Overall, military education is designed to cultivate adaptability, resilience, and critical decision-making under pressure, all of which are essential for navigating the complexities of modern military operations. For example, during officer training, candidates engage in simulated battlefield exercises that require them to make split-second decisions in high-stress environments, mirroring real-world combat scenarios. This hands-on approach ensures that service members can apply their training in unpredictable situations, whether responding to an ambush in a conflict zone or coordinating disaster relief efforts in humanitarian missions. By emphasizing practical application and scenario-based learning, military education prepares personnel to think strategically, act decisively, and adapt to rapidly changing operational demands across the globe.

Background

In 2020, the Joint Chiefs of Staff (JCS) published guidance emphasizing the need for enhanced professional military education across the Department of Defense (DOD). While technological advancements and sophisticated weaponry continue to evolve, the JCS stresses that military success should not rely solely on these innovations. Instead, they advocate for developing leaders at all levels who possess the intellectual agility to outthink and outmaneuver adversaries, ensuring strategic superiority in complex operational environments (Joint Chiefs of Staff, 2020). In response to this guidance, the Marine Corps released Training and Education 2030 in January 2023 and revised Marine Corps Doctrinal Publication (MCDP) 7: Learning in February 2020, reinforcing the

commitment to continuous learning and leadership development. Through these doctrinal publications, the Marine Corps focused on professionalizing their instructor force to ensure the transfer of learning across all levels of formal schools. Prior to this guidance, instructors across the Marine Corps were subject matter experts (SMEs) assigned to the formal learning center (FLC) and given freedom to pass on knowledge to the incoming student as they saw fit (Schmidt, 2014). Since the JCS guidance, the Marine Corps Center for Learning and Faculty Development (MCCLFD) has developed and implemented a course that facilitates learning experiences, among others, to professionalize instructors.

This research study was conducted in the summer of 2024 during the Facilitating Learning Experiences (FLEX) Courses at the MCCLFD. The FLEX Course is designed to enhance the instructional capabilities of Marine Corps educators by providing pedagogical training, instructional strategies, and methods to improve learning transfer within military education settings. The MCCLFD plays a critical role in developing and refining faculty expertise across Marine Corps learning institutions. Its mission is as follows:

Transform into the service premier learning organization that develops world-class leaders capable of designing, developing, and facilitating active, student-centered adult learning across the learning continuum in order to transition service-level learning from the industrial age to information age and create the 2030 force required to fight and win against near-peer competitors. (Training Command, n.d.)

To accomplish the above stated mission, MCCLFD hosts four separate courses on how to conduct training effectively, educating approximately 1200 students per fiscal

year, with a planned expansion of 2 additional courses for approximately 400 students, to expand upon 21st century learning techniques in leadership and staff positions. (T. Wheland, personal communication, July 15, 2024). This expansion of courses addresses the increasing demand for a deeper understanding of new instructional techniques and professional education, particularly at the middle management level, including Staff Non-Commissioned Officers (SNCOs) and Officers. As military operations grow more complex due to the rise in technology, these leaders must develop advanced critical thinking, decision-making, and instructional skills to effectively train and mentor the next generation of Marines. By incorporating additional courses, MCCLFD aims to equip SNCOs and Officers with modern pedagogical strategies, ensuring they are prepared to lead, educate, and adapt to evolving challenges in both operational and institutional environments of a complex world.

The FLEX course is a two-week program focused on the professional development of instructors by applying adult learning principles and 21st-century educational methodologies (M. Wagaman, personal communication, July 16, 2024). The course is designed for personnel serving as facilitators at formal learning centers (FLCs) to introduce them to modern facilitation strategies. The observations of instructors learning new methodologies that are needed at the FLCs highlights the learning transfer process. Participants in the course range in rank from Corporal (enlisted) to Colonel (officer) and include civilian staff members assigned to FLCs (M. Wagaman, personal communication, July 16, 2024; C. Fernandez, personal communication, July 16, 2024). The FLCs represented in the course are diverse, covering various disciplines. For instance, schools participating in the program usually include representatives from

multiple fields, such as music, swimming, infantry, martial arts, information technology, artillery, and motor transport. Additionally, the FLCs categorize their learners into different proficiency levels, including entry, intermediate, and advanced in order to better tailor the material to the learner's experience levels (N. Galvan, personal communication, July 18, 2024; C. Fernandez, personal communication, July 16, 2024). The diversity of participants and disciplines represented in the FLEX course demonstrates its critical role in fostering adaptable and well-rounded instructors within the military education system. Building on the foundations of the FLEX course, the following key concepts provide deeper insight into the educational principles driving its design and implementation.

FLEX Key Concepts

Facilitator training has emerged as a foundational element in fostering effective group interactions across a variety of settings. Whether in classrooms, corporate environments, or community initiatives, the role of the facilitator is pivotal in guiding conversations, encouraging collaboration, and steering groups toward shared goals. To perform this role effectively, individuals require structured training that develops not only their technical knowledge but also their interpersonal and reflective skills. This section explores the core components that underpin effective facilitator training, highlighting the essential techniques and competencies that enable facilitators to create engaging, inclusive, and goal-oriented group experiences.

21st-Century Learning

21st-century learning refers to educational practices, skills, and approaches to prepare students for the challenges and opportunities of the modern, interconnected world (Bernhardt, 2015; Kereluik et al., 2013; Laal et al., 2012). This philosophy focuses on

equipping learners with the necessary tools to thrive in the digital age by fostering creativity, critical thinking, communication, and collaboration. Examples of 21st-century learning include but are not limited to round table discussions, fishbowls, chalk talks, students listing what they know about the topic, and self-directed learning. Unlike traditional education models that often emphasize rote memorization, 21st-century learning prioritizes adaptability, innovation, and real-world problem-solving (Bernhardt, 2015; J. Johnson, personal communication, July 16, 2024; Laal et al., 2012).

Facilitator Training

Facilitator training refers to the education and skill development provided to individuals responsible for guiding and managing group discussions, workshops, meetings, or learning sessions (Banks, 2019; Biech, 2017). Facilitators are crucial in creating environments where participants can engage in meaningful dialogue, collaborate effectively, and achieve specific learning and training objectives (Biech, 2017). Whether in educational, organizational, or community settings, facilitator training equips individuals with the techniques and tools necessary to lead groups, manage group dynamics, and ensure productive outcomes (Banks, 2019; Biech, 2017).

Critical components of facilitator training include several essential skills. Communication skills are at the forefront, teaching facilitators to communicate clearly, listen actively, and encourage open discussion while maintaining focus on the topic. Understanding group dynamics and participation is equally important, as facilitators must manage diverse personalities, promote involvement from all members, and handle dominant or passive participants (Banks, 2019; Biech, 2017; Salas et al., 2012).

Facilitators also receive training in problem-solving and conflict resolution techniques to address conflicts, resolve disagreements, and guide groups toward consensus or mutually agreeable solutions. Mastering questioning and listening techniques is another critical component, helping facilitators ask practical questions that stimulate thought and discussion while ensuring all participants feel heard through active listening (Banks, 2019; Biech, 2017). Maintaining neutrality and objectivity is vital, as facilitators must guide the process without imposing their opinions or influencing outcomes, allowing participants to lead the discussion. Time management is another crucial skill, teaching facilitators to keep sessions on schedule, focus discussions, and manage activities to meet session goals (Biech, 2017).

Facilitators are also introduced to various tools and techniques, such as brainstorming, mind mapping, icebreakers, and decision-making frameworks, to engage participants and make the facilitation process more effective. An essential part of the training is learning to create a safe and inclusive environment, where facilitators foster a respectful atmosphere that encourages participants to express their ideas and perspectives freely (Banks, 2019; Biech, 2017).

Finally, evaluation and feedback skills are taught, enabling facilitators to assess the effectiveness of sessions, provide constructive feedback, and facilitate continuous improvement. Facilitator training is essential in fields like education, business, leadership development, conflict resolution, and community engagement, where group collaboration and effective communication are critical to achieving desired outcomes (Biech, 2017).

Statement of Problem

The effective transfer of training holds substantial significance for both individual professional growth and organizational effectiveness. This is particularly relevant across diverse sectors, including civilian institutions and, notably, the military, which represents one of the largest consumers of adult education. Given the extensive application of training in military contexts, ensuring successful knowledge transfer is critical. Within military education, instructors demonstrate a profound commitment to self-improvement, recognizing that the effective application of their training has direct implications for their safety and the well-being of their fellow service members.

Purpose of the Study

This research study aimed to examine the transfer of knowledge from training centers to the operational implementation by personnel using the training. Specifically, the study investigated the information and techniques disseminated at the Marine Corps Center for Learning and Faculty Development (MCCLFD) and their subsequent application within the various schools across the Marine Corps by trainees. At its core, this study examined how process improvements were transferred through the organization—tracing the flow of learning from upper management levels down to the point of implementation at the lowest operational tiers.

RQ: (1) What are the experiences and perceptions of military school instructors in a faculty development school course?

RQ: (2) What are the experiences and perceptions of military school instructors on implementing training from a faculty development school course?

Method

This research study employed a qualitative case study approach to explore the experiences and perceptions of Marine Corps FLC instructors during and after completing the FLEX course. Data collection involved in-person interviews with six students and four faculty members, as well as follow-up phone interviews with four students, capturing insights into their interactions with faculty, overall impressions of the course, and the application of their learning upon returning to their FLCs. The study utilized convenience sampling to recruit participants, focusing on those readily available at the FLEX course and for a follow up interview six weeks later during the summer of 2024 (Yin, 2018). Observations of student discussions served as a key component of triangulation, providing additional context and validation to complement interview data and faculty perspectives. By integrating multiple data sources, this approach ensured a more comprehensive and reliable understanding of the challenges, facilitators, and overall impact of the FLEX course on both students and faculty.

Scope and Limitations

This case study examined the perceptions and experiences of professional military instructors at the beginning of their careers as facilitators in FLCs for the United States Marine Corps. The primary focus was understanding how these instructors adapt to their roles, engage with students, and apply instructional techniques in the classroom setting. However, the scope of this study is limited by several factors. First, it utilized a convenience sample during a specific period of time, for Marines progressing through the FLEX course, which may only partially represent the diversity of experiences across different courses, instructors, or learning environments. Additionally, the majority of instructors observed were relatively inexperienced, having only recently assumed their

roles. The majority had been part of their Formal Learning Center (FLC) for only three days to three months, indicating that their teaching methods and facilitation styles were still in the early stages of development.

The limited duration of the observation period further constrained the study, as it captured a snapshot of the instructors' performance over a short time frame. Additionally, only one group of instructors was observed, meaning the findings reflected the experiences of a specific cohort rather than a broad representation of all instructors across the Marine Corps. Consequently, long-term patterns in their professional growth, adaptation to challenges, or changes in their teaching strategies were not addressed. Furthermore, the interviews were conducted after only two weeks of instructional experience, potentially limiting the depth of insights they provided regarding their roles, challenges, and the evolution of their teaching approaches. Due to these limitations, the findings of this case study may not be generalizable to all military instructors or training contexts within the Marine Corps. Nevertheless, it provides valuable insights into the early career experiences of military instructors and offers a foundation for future research in this area.

Organization of the Thesis

This thesis was organized into five chapters. The first chapter provided an introduction and context for the research that was conducted. This chapter included essential information on Military Instructors, Formal Learning Centers, and 21st-century learning strategies, as well as the research questions that guided the study, and outlined the assumptions, limitations, and definitions relevant to the work.

Chapter Two was a literature review that offered insight, data, and contextual background essential to the study. Drawing from a range of scholarly journals, books, professional publications, dissertations, and other credible sources, the review focused on how educators facilitated learning transfer to the workforce—a key concern in workforce development and training effectiveness. It explored instructional strategies, learning environments, and support mechanisms that enabled learners to apply acquired knowledge and skills in real-world professional settings. However, the literature revealed notable gaps that the study aimed to address. Specifically, there was limited research on how educators and training staff themselves received, processed, and implemented new knowledge into their instructional practices. Furthermore, there was a lack of focused inquiry into how learning transfer occurred within military units as a distinct workforce context, where hierarchical structures, operational demands, and unique training environments may have influenced the transfer process. This chapter established the scholarly foundation for the study while identifying critical areas where further research was needed to enhance both educational practice and organizational learning outcomes.

Chapter Three described the methods that were utilized to conduct the study, highlighting the qualitative elements of the research, the sample size of participants, and the approach to data collection. The chapter also detailed the process of data collection and the handling of human subjects involved in the study.

Chapter Four presented the collected data and the findings of the study. The data were organized into three main themes.

Chapter Five presented the study's conclusions derived from data analysis and situated them within the broader context of existing research, highlighting how the

findings aligned with or diverged from prior studies. These conclusions offered valuable insights for stakeholders—researchers, practitioners, and policymakers—by providing evidence that could inform future initiatives and decision-making. The chapter also outlined specific directions for future research, addressing gaps identified during the study and suggesting areas for continued exploration. In doing so, it underscored the study’s significance in contributing to academic discourse and in guiding future research and practice.

Conclusion

In conclusion, this study aimed to shed light on the early stages of military instructors' careers as they transition into formal teaching roles within the United States Marine Corps. While the scope of this case study is limited to one cohort of instructors undergoing the FLEX course, it provides meaningful insights into the challenges and experiences these professionals face as they develop their facilitation skills. The study acknowledges limitations, such as the short observation period, the instructors' limited experience, and the focus on a single course. However, it highlights the critical role of professional military education and the importance of practical knowledge transfer in fostering well-prepared leaders and facilitators within the Marine Corps.

Chapter Two: Review of Literature

Chapter Two provides a review of the literature and research on the foundation of learning transfer, the current definition or concept of learning transfer, military education, and the professional development and training of military instructors. The chapter also provides a review of the theoretical models forming the conceptual framework used in this study: constructivism, social learning theories, experiential learning, Baldwin and Ford's Transfer Model, and the Holton Transfer Model. In doing so, the chapter identifies critical gaps in existing research—specifically, the limited understanding of how educators and training staff receive and implement new knowledge, as well as the scarcity of research examining how learning transfer functions within military units as a workforce. This study seeks to explore and address these gaps, thereby contributing to both academic literature and the practical improvement of instructional effectiveness in military settings. Finally, a summary of the chapter is presented.

Military Education

Education uses various methods to engage learners and influence learning outcomes across higher education and adult education. Education is not just a concept found in formal schools, indeed, as Hampson and Taber (2020) pointed out the U.S. Military itself is one of the largest providers of education to adults. Within military education, the cultivation of skilled and effective instructors stands as a cornerstone for enhancing the capabilities and readiness of military personnel. In acknowledging the multifaceted nature of warfighting, military institutions, such as the US Marine Corps, recognize the paramount importance of continuous learning and learning transfer for adults (U.S. Marine Corps & Berger, 2020). This statement underscores a fundamental

ethos within the Military, a commitment to ongoing professional development that extends to learners and educators across disciplines (Van Baarle et al., 2015).

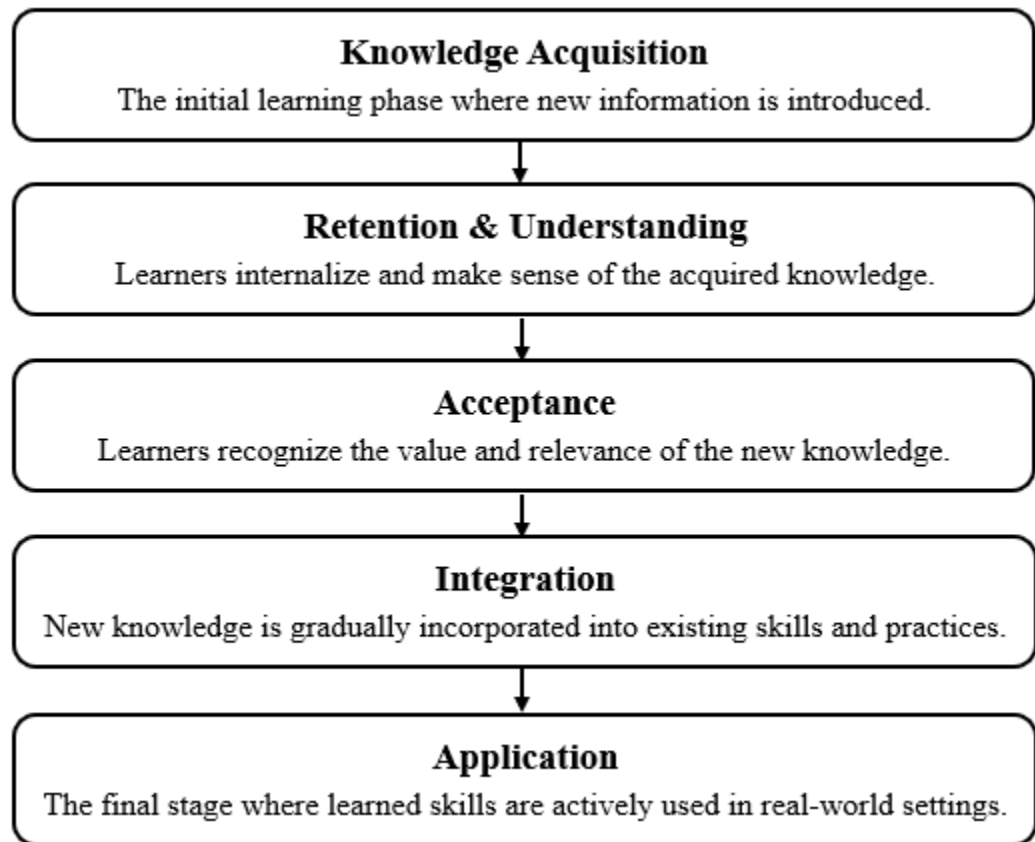
Amidst this backdrop, several vital areas emerge as focal points for research and inquiry within faculty development. Firstly, there is a growing emphasis on facilitating the learners experience and development of military instructors, transforming them from SMEs into professional educators equipped with comprehensive andragogical skills (ALC 2015; JCS Vision & Guidance for Professional Military Education, 2023). A professional educator is more effective than a subject matter expert in teaching because they possess pedagogical skills that facilitate knowledge transfer, engagement, and adaptability to diverse learning styles, whereas subject matter experts may lack instructional techniques (Shulman, 1986). Research also shows that trained educators improve student comprehension and retention better than content specialists without teaching experience (Darling-Hammond, 2000). This shift reflects a broader trend in educational philosophy, recognizing that effective teaching is more than content delivery as it encompasses an understanding of the learning process (Schmidt, 2014).

The modern workforce demands continuous development for adult workers striving towards self-actualization, necessitating high competence and competitiveness in their career paths (Chuang, 2021). Just as the military emphasizes structured training, leadership development, and adaptability under pressure, the modern workforce increasingly values these same skills to navigate rapidly evolving industries and complex problem-solving environments (Snider, 1999; Schwartz et al., 2019) In this context, training emerges as an essential facet of workforce education and development, enhancing the understanding of how learning translates into practical application within

the work environment (Baldwin & Ford, 1988; Blume et al., 2009; Ford et al., 2017; Huang et al., 2016). As articulated by Biech (2017), contrary to viewing learning transfer as a singular event, it is more aptly conceptualized as a multifaceted process. This process involves acquiring and retaining knowledge and hinges on factors such as message salience, personal interest, and cognitive awareness, shaping the acceptance and integration of the learning experiences (Biech, 2017). Moreover, the transfer of learning is depicted as a psychological journey unfolding over time, necessitating continuous follow-up and meticulous attention to pre- and post-training activities to foster effective transfer (Biech, 2017; Taylor, 2022).

Figure 1

Learning Transfer Path



Note: This figure illustrates learning transfer as a psychological journey, based on Biech (2017) and Taylor (2022). It highlights the multifaceted nature of learning transfer, progressing through five key stages.

Within this dynamic process, the maintenance of acquired knowledge within the workplace emerges as equally pivotal, underscoring the role of supervisors in cultivating an environment favorable to sustained learning and application (Baldwin & Ford, 1988; Blume et al., 2009; Ford et al., 2017; Huang et al., 2016). Readiness, motivation, and self-efficacy play a crucial role in knowledge retention and application, highlighting the importance of clear pre-training messaging to prepare learners and effective post-training messaging to reinforce and facilitate knowledge transfer (Taylor, 2022). Additionally, the broader organizational culture, characterized by a commitment to learning, significantly influences the efficacy of training transfer (Biech, 2017). Notably, the individual learner is central in their role in this intricate process, wherein the psychological journey of knowledge acquisition fundamentally shapes the acceptance and integration of learning experiences, extending beyond mere retention and recall (Biech, 2017; Taylor, 2022).

Theoretical Framework

Constructivism, the three dimensions of learning, and social learning theories are fundamental frameworks that shed light on how adults learn and develop. These theories emphasize the active role of learners in their educational journey, where trainers and supervisors act as facilitators rather than traditional instructors (Boone et al., 1977; Bonnes & Hochholdinger, 2020). Hochholdinger and Keller (2015) explored the relationship between trainees' affective responses, trainers' teaching orientations, and the content of professional development programs. Their study highlighted how different

instructional approaches influence participants' engagement, motivation, and overall learning experience. These researchers found that trainers who adopt a learner-centered teaching style—one that prioritizes interaction, adaptability, and practical application—tend to elicit more positive emotional reactions from trainees, which in turn enhances knowledge retention and skill transfer. Conversely, a rigid, lecture-based approach was associated with lower engagement and reduced training effectiveness. These findings emphasize the need for trainers to consider both pedagogical strategies and content relevance when designing professional learning experiences to maximize participant outcomes.

Central to this approach, constructivist strategies advocate for learners' active construction of knowledge through self-directed learning, employing diverse methods such as exercises, group work, and role-play scenarios to promote autonomous learning and critical thinking (Boone et al., 1977; Bonnes & Hochholdinger, 2020). Furthermore, learner centric orientation customizes training to align with individual needs, preferences, and learning styles, ensuring both relevance and effectiveness by actively engaging learners and prioritizing their role in the educational process. This approach emphasizes adaptability, allowing instructors to modify content delivery, instructional methods, and assessment strategies based on learners' backgrounds, prior knowledge, and specific goals. By fostering a more interactive and student-centered learning environment, learner orientation enhances motivation, increases knowledge retention, and facilitates the practical application of skills in real-world contexts (Boone et al., 1977; Bonnes & Hochholdinger, 2020).

Active learning, a core tenet of constructivism and social learning theories, emphasizes hands-on experiences and practical application, enabling learners to develop skills directly applicable to real-world contexts (Bonnes & Hochholdinger, 2020). These theories posit that knowledge is actively constructed through activities and reflections rather than passively absorbed, empowering learners to control the learning process (Chuang, 2021; Katz & Halpern, 2015). Instructors in these environments assume roles as mentors or facilitators, guiding learners in connecting new information and existing knowledge (Chuang, 2021). With the diverse backgrounds of adult learners in mind, educators must select appropriate methods tailored to learners' characteristics to ensure meaningful learning outcomes (Chuang, 2021).

Instructor Training and Development

Engaging in the act of warfighting represents a multifaceted, demanding, and dynamic human endeavor (U.S. Marine Corps & Berger, 2020). The human dimension of military operations carries immense weight, as every task—from vehicle maintenance to executing combat objectives to managing critical information networks—has the potential to preserve or cost human lives. This reality underscores the profound responsibility placed on cultivating expertise and professionalism throughout the military. Recognizing the critical role that learning and knowledge transfer play in enhancing warfighting effectiveness, both the Marine Corps and the broader Military must treat these elements as operational imperatives (U.S. Marine Corps & Berger, 2020). A culture of continuous learning and knowledge sharing is deeply embedded in the Military's identity, with service members acting simultaneously as learners and educators (Van Baarle et al., 2015). Importantly, the sheer scale of the Military, comprising 1.3 million

active-duty personnel deployed globally, including in combat zones, introduces challenges distinct from those faced by civilian academic institutions or corporate training organizations, which typically support 33,000 to 100,000 learners or employees (Auburn University, n.d.; Department of Defense et al., 2021; Schmidt, 2014; Wakabayashi, 2019). Consequently, it is reasonable to assert that the Military constitutes a singular institution with a workforce characterized by exceptional scale, scope, and mindset.

In 2015 for the Army and 2023 for the Marine Corps, a concerted effort emerged to enhance adult education and elevate the professionalism of the instructor corps (ALC 2015; JCS Vision & Guidance for Professional Military Education, 2023). This initiative aims to transform instructors from mere subject matter experts (SMEs) into expert educators with a deep understanding of the material and insight into the learning process (Schmidt, 2014). In alignment with this shift, there has been a renewed emphasis on formal learning centers (FLCs) that play a pivotal role in shaping the broader corps through comprehensive training programs (JCS Vision & Guidance for Professional Military Education, 2023). As the primary hubs for introducing new processes and doctrine, FLCs serve as the foundation for institutional change within the Marine Corps.

By ensuring that emerging strategies, technologies, and operational concepts are effectively taught and implemented, these centers directly influence the development of Marines and the evolution of the Corps as a whole (JCS Vision & Guidance for Professional Military Education, 2023; U.S. Marine Corps & Berger, 2020). Assessing the effectiveness of such training involves evaluating students' knowledge acquisition through assessments and surveys (Khasawneh et al., 2024). From a holistic view, learning

encompasses more than mere acquisition; it involves accepting knowledge (Taylor, 2022). This distinction is critical as true learning requires not only understanding new information but also integrating it into one's thinking and actions. Without acceptance, knowledge remains theoretical rather than becoming a practical tool for decision-making and problem-solving.

Faculty development has become a significant activity in the civilian world, and now, there is a growing demand for it in the unique setting of military schools (ALC 2015; JCS Vision & Guidance for Professional Military Education, 2023; U.S. Marine Corps & Berger, 2020). Evidence from studies involving civilian organizations (Tobin et al., 2020; Schmidt, 2014) has demonstrated that faculty development has yielded significant, positive impacts. As an example, Tobin et al. (2020) conducted a study in which medical trainers were tasked with teaching students Ebola decontamination procedures, comparing the effectiveness of experienced trainers to that of novices. The researchers noticed only marginal differences between the two groups, contrary to the asserted belief that the experienced trainers would prove superior in delivery and modeling. The course materials provided proved to be the most significant contributor to success. In some learning objectives, even the novice trainers outperformed the experienced trainers (Tobin et al., 2020). These findings highlight the critical role of well-designed instructional materials and suggest that, in military education as in civilian contexts, structured faculty development—regardless of prior experience—can significantly enhance instructional effectiveness.

Learning Transfer

Chuang (2021) emphasized that self-actualization—the realization of one’s full potential—requires continuous development, particularly for adult workers striving to maintain high levels of competence and competitiveness in their careers. Rooted in Maslow’s (1943) hierarchy of needs, self-actualization occupies the highest level, reflecting an individual’s desire for personal and professional growth through the maximization of skills, creativity, and purpose. Achieving this state is not a static goal but an ongoing process that involves acquiring new knowledge, refining expertise, and aligning with evolving industry demands and personal aspirations, all of which contribute to greater fulfillment and career success (Ryan & Deci, 2000). In this context, training becomes not only a strategic necessity but a psychological imperative, an enabler of self-actualization, making the understanding of how learning transfers to the workplace critical for both individual development and organizational effectiveness (Baldwin & Ford, 1988; Ford et al., 2017).

The transfer of learning is not merely an event but rather a dynamic and ongoing process (Biech, 2017). It involves multiple stages, including initial knowledge acquisition, contextual application, reinforcement through practice, and eventual adaptation to new and evolving situations (Perkins & Salomon, 1992). Effective transfer requires not only the retention of information but also the ability to apply learned skills in diverse contexts, making it essential for long-term professional growth and competency development (Baldwin & Ford, 1988; see Figure 2 below). Trainees must not only attain competence but also harbor confidence and commitment to effectively apply learned knowledge, skills, and behaviors (Biech, 2017). This acceptance of learning begins with

acquiring and retaining knowledge, a process influenced by various factors such as message salience, personal interest, and cognitive awareness (Biech, 2017). Ultimately, understanding and fostering the transfer of learning is crucial because it bridges the gap between training and real-world performance, ensuring that investments in education translate into measurable improvements in professional capability, adaptability, and mission readiness.

Moreover, it is imperative to recognize that the transfer of learning is not an isolated occurrence but rather a psychological journey that unfolds over time (Biech, 2017; Taylor, 2022). Ensuring effective transfer necessitates ongoing follow-up, starting from the conclusion of training sessions and extending into the application phase (Biech, 2017; Taylor, 2022). Thus, meticulous attention to pre- and post-training activities is paramount to cultivating the acceptance and transfer of learning (Biech, 2017). Training involves not only the acquisition of new material but also the maintenance of that material over time, which is crucial for ensuring long-term competency and effective application in real-world settings. Without reinforcement and continuous practice, newly learned skills and knowledge can deteriorate due to the natural effects of forgetting (Murre & Dros, 2015).

Technology

The evolution of workforce training has increasingly incorporated technology-driven learning models to improve knowledge retention and enhance skill transfer. Song and Nam (2025) highlight the growing role of augmented reality (AR) training in facilitating effective learning transfer, particularly in technical skill acquisition. Their study demonstrated how machine learning-based adaptive learning environments can

tailor instruction to individual trainees, improving their ability to retain and apply learned concepts. The research underscored the significance of personalized and hands-on training approaches, which not only increase engagement but also allow trainees to practice skills in real-world simulated environments before applying them in the workforce. This aligns with broader learning transfer research, emphasizing active learning strategies that bridge the gap between training and practical application (Blume et al., 2010; Salas et al., 2012).

Cepeda et al. (2006) emphasized the role of digital learning tools in mitigating knowledge decay and enhancing retention. Their research suggested that spaced repetition, active recall, and real-world applications significantly improve learning transfer. Song and Nam (2025) reinforced Cepeda et al. (2006) by demonstrating that immersive learning environments, such as those utilizing AR and machine learning, provide an adaptable framework for sustaining knowledge over time. These approaches ensure that trainees engage in interactive experiences that simulate real-world challenges, thereby strengthening their ability to transfer acquired skills to their professional roles.

This process and application underscore the need for structured follow-up, refresher training, and performance support systems to facilitate ongoing learning and prevent knowledge decay. By incorporating technology-enhanced training solutions, organizations can bridge the gap between training environments and workforce applications, ensuring that learning transfer is not only effective but also sustainable in rapidly evolving industries.

Training Acquisition

As outlined by Baldwin and Ford (1988) and Taylor (2022), positive learning transfer denotes the acceptance and application of acquired knowledge, skills, and behaviors within the workplace. Memories and retention begin with messages that capture attention based on interest and cognitive awareness (Biech, 2017).

The transfer-facilitating strategy category shows a high overlap with the constructivist strategy category. This overlap highlights the close relationship between the two categories. Both include the use of similar methods and an action-related or practice-related approach. Transfer-facilitating strategies are learner-oriented and refer to all techniques that enable the transfer of the acquired knowledge and competencies into the working practice of the learners (Burke & Hutchins 2007; Grossman & Salas 2011; Salas et al. 2012).

The methods facilitating transfer encompass concrete approaches that offer learners opportunities to gain practical experience and apply acquired knowledge from training sessions. These methods include exercises, role-play activities, video feedback, games, and case studies (Burke & Hutchins, 2007). Practical implementation and application involve allowing learners to utilize learned skills without specifying a particular method. Connecting training content with real-world practice is crucial, achieved through examples or exercises resembling authentic work situations (Salas et al. 2012). Enabling transfer entails offering learners chances to apply newly acquired knowledge in their professional settings (Biech, 2017). Feedback, an integral part of transfer facilitation, involves providing learners with input from trainers or peers and acknowledging its significance in enhancing transfer according to existing training research literature (Burke & Hutchins 2007; Grossman & Salas 2011; Salas et al. 2012).

Training Maintenance

As Taylor (2022) underscored, the conclusion of training marks not an endpoint, but the beginning of its true value—application on the job. Maintenance of knowledge in the workplace is equally pivotal as its acquisition because, without ongoing reinforcement, even well-internalized training can fade, reducing its practical impact. Sustaining learning over time is essential for ensuring that knowledge translates into consistent and effective performance. Supervisors play a vital role in this process, shaping the learning environment by modeling desired behaviors, setting performance expectations, offering encouragement, and reinforcing learning through tangible incentives (Baldwin & Ford, 1988). One of the most effective ways to support knowledge maintenance is through pre- and post-training messaging, which serves as a structured mechanism to sustain learning transfer (Biech, 2017). Pre-training messaging builds motivation and relevance by aligning learning with real-world performance expectations, while post-training support—such as coaching, feedback, and job aids—ensures continued reinforcement and application (Blume et al., 2010). Furthermore, cultivating self-efficacy through peer support, success sharing, and skill demonstrations enhances confidence and fosters a culture of continuous learning and improvement (Boone et al., 1977).

The environment surrounding the trainee also significantly influences the transfer of training. Research from the Association for Talent Development (ATD), a leading professional organization dedicated to workplace learning and talent development, emphasized that fostering a strong learning culture is essential for ensuring effective knowledge and skill transfer (Biech, 2017). ATD provides industry research, best

practices, and professional development resources to support organizations in designing training programs that maximize employee growth and performance. Trainees view excellent trainer performance as a motivating element, experiencing a state of flow that boosts their performance and ultimately leads to successful training transfer (Na-Nan & Sanamthong, 2019).

Ultimately, the individual serves as the final and most crucial element in acquiring and internalizing knowledge during training. The process of learning is deeply intertwined with the learner's psychological journey, encompassing motivation, self-efficacy, and emotional engagement, all of which influence how knowledge is absorbed, retained, and applied (Taylor, 2022). Transfer, therefore, is not solely about retention and recall but also about the learner's ability to integrate new information into their existing cognitive framework and apply it meaningfully in real-world scenarios (Biech, 2017). This highlights the importance of addressing psychological factors such as confidence, perceived relevance, and mindset, which ultimately determine whether learning translates into practical skill development and workplace performance.

Constructivism and Social Learning Theories

Constructivism and social learning theories provide valuable frameworks for understanding adult learning and skill development, particularly in interdisciplinary and professional training environments. A trainee-focused strategy, often synonymous with a constructivist approach, prioritizes active participation in learning, where trainers and supervisors serve as facilitators rather than traditional instructors (Bonnes & Hochholding, 2020). Constructivist strategies emphasize learners' active construction of

knowledge through self-directed learning, rather than passive reception of information (Bonnes & Hochholdinger, 2020; Chuang, 2021).

These instructional methods include exercises, group projects, role-playing scenarios, video feedback, and structured discussions—all designed to foster autonomous learning and critical thinking (Bonnes & Hochholdinger, 2020). Learner-centered strategies like these encourage deeper conceptual understanding and more meaningful, transferable learning outcomes. In their 2020 study, Bonnes and Hochholdinger examined a professional development program for educators, focusing on how interactive and adaptive teaching strategies influenced participant reactions and evaluations. The study utilized surveys and observational assessments to analyze emotional engagement, satisfaction, and perceived instructional effectiveness. Findings revealed that training programs incorporating personalized, contextually relevant, and interactive elements significantly enhanced participants' motivation, confidence, and willingness to apply new knowledge and skills. The study highlighted a strong correlation between adaptive, learner-centered instruction and positive affective outcomes, suggesting that when instruction is tailored to learner needs and real-world contexts, it improves both immediate engagement and long-term knowledge transfer.

Moreno, Rhodes, and Rezende (2025) emphasized the effectiveness of collaborative, multiprofessional training models in promoting learning transfer, particularly within high-stakes environments such as healthcare. Their study underscored the value of peer-driven reinforcement, where learning is strengthened through shared experiences, feedback, and mutual accountability among colleagues. In high-pressure settings, this reinforcement becomes especially critical, as it not only supports individual

knowledge retention but also fosters team cohesion and adaptability under stress. The researchers found that interdisciplinary collaboration—through simulations, team-based exercises, and joint problem-solving—not only enhances immediate learning but also increases the likelihood of real-world application. These findings are consistent with constructivist learning theory, which posits that active, social, and contextual learning leads to deeper understanding and improved performance. Moreno et al. (2025) further noted that training in interdisciplinary teams mirrors actual professional settings, enabling learners to internalize knowledge more effectively and apply it confidently in complex, dynamic environments.

Learner Orientation and Personalized Instruction

Another critical aspect of constructivist theory is learner orientation, which involves tailoring training to meet individual learners' specific needs and professional contexts (Bonnes & Hochholding, 2020). Trainers adapt content and delivery methods by continuously assessing learners' reactions, soliciting feedback, and identifying explicitly stated needs to create a more responsive and learner-centered training experience. This process involves incorporating flexible instructional strategies such as active learning, scenario-based training, and differentiated instruction to match varying learning styles and professional backgrounds (Dirksen, 2016).

By actively engaging participants through interactive discussions, real-world applications, and adaptive assessments, trainers ensure that learning is both relevant and meaningful. This aligns with research by Bell and Kozlowski (2008), who found that learner-centered instructional strategies—particularly those involving active engagement and contextual relevance—significantly improve learning outcomes and motivation. This

personalized approach not only enhances knowledge retention and skill acquisition but also fosters greater motivation and self-efficacy, ultimately improving training effectiveness and long-term transfer of learning (Salas et al., 2012). Moreno et al. (2025) reinforced this approach by demonstrating that collaborative, interdisciplinary training programs help trainees better integrate newly acquired skills in real-world settings. Bell and Kozlowski's (2008) experimental study examined how training design features—such as learner control, interactivity, and contextual relevance—impacted self-regulatory processes, learning outcomes, and adaptability. They found that active engagement with realistic scenarios significantly improved knowledge retention and application. Similarly, Moreno et al. (2025) conducted a mixed-methods study within healthcare and other high-stakes professions, demonstrating that when training programs incorporate interdisciplinary collaboration, peer-driven reinforcement, and real-world task alignment, trainees are more likely to retain and apply new skills in practice. Together, these studies indicate that training content aligned with real-world challenges and supported through structured collaboration and social reinforcement significantly enhances learning transfer and long-term effectiveness.

Active Learning and Social Interaction

Active learning, a fundamental principle of constructivism and social learning theories, emphasizes hands-on experiences and the practical application of learned concepts (Bonnes & Hochholdinger, 2020). Instead of passively receiving information, learners are encouraged to actively engage with the material, gaining firsthand experience and developing practical skills directly applicable to real-world contexts.

Under constructivist learning theory, knowledge is seen as actively constructed by individuals through activities and reflections, rather than passively absorbed (Chuang, 2021). Learners are further motivated by their control over the learning content and activities, which enhances their ability to apply knowledge effectively (Katz & Halpern, 2015). Similarly, social learning theory emphasizes the importance of human relations and social interactions in learning, highlighting the role of peer collaboration and observation (Chuang, 2021).

Moreno et al. (2025) further supported the significance of social learning in training environments, particularly through multiprofessional collaboration. Their study on intensive care medicine training in Portugal highlights how peer-driven reinforcement, shared learning experiences, and real-world practice simulations enhance knowledge transfer. They found that when learners engage in collaborative exercises that mimic real-world professional interactions, they develop not only technical competency but also problem-solving skills, adaptability, and teamwork effectiveness—all of which strengthen long-term learning retention and application.

The Role of Instructors as Facilitators

Instructors in constructivist and social learning environments take on the role of mentors or facilitators, guiding learners in making meaning of new information and connecting it to their existing knowledge and experiences (Chuang, 2021). By adopting a learner-centered approach and fostering a growth mindset, instructors empower learners to take ownership of their learning journey and strive for continuous improvement (Chuang, 2021).

Given the diverse backgrounds and experiences of adult learners, educators must select appropriate learning methods based on learner characteristics, such as age, gender, and life experiences (Chuang, 2021). This tailored approach ensures that learning experiences are relevant, engaging, and conducive to meaningful learning outcomes for all participants. Moreno et al. (2025) confirmed that collaborative and interdisciplinary training approaches not only enhance individual competency but also improve organizational learning cultures by encouraging knowledge-sharing, mentorship, and structured follow-up activities that reinforce learning over time.

Constructivism and social learning theories offer valuable insights into effective adult learning practices, emphasizing active participation, social reinforcement, and practical application of knowledge. Moreno et al. (2025) contributed to this discussion by demonstrating that multiprofessional training models improve learning transfer through collaborative skill application, peer-driven reinforcement, and real-world simulations. Such findings highlight that when learners engage in interdisciplinary, hands-on experiences within realistic contexts, they are more likely to internalize knowledge and apply it effectively over time. This aligns with Bonnes and Hochholdinger's (2020) qualitative research, which found that experiential, learner-centered strategies enhance emotional engagement, increase relevance, and improve the integration of new skills into professional routines. Together, these studies underscore the critical role of interdisciplinary collaboration and experiential learning in promoting long-term knowledge retention and the development of professional competency. The integration of structured training methodologies, peer-based reinforcement, and workplace application ensures that learning transfer is not only effective but sustainable, ultimately producing

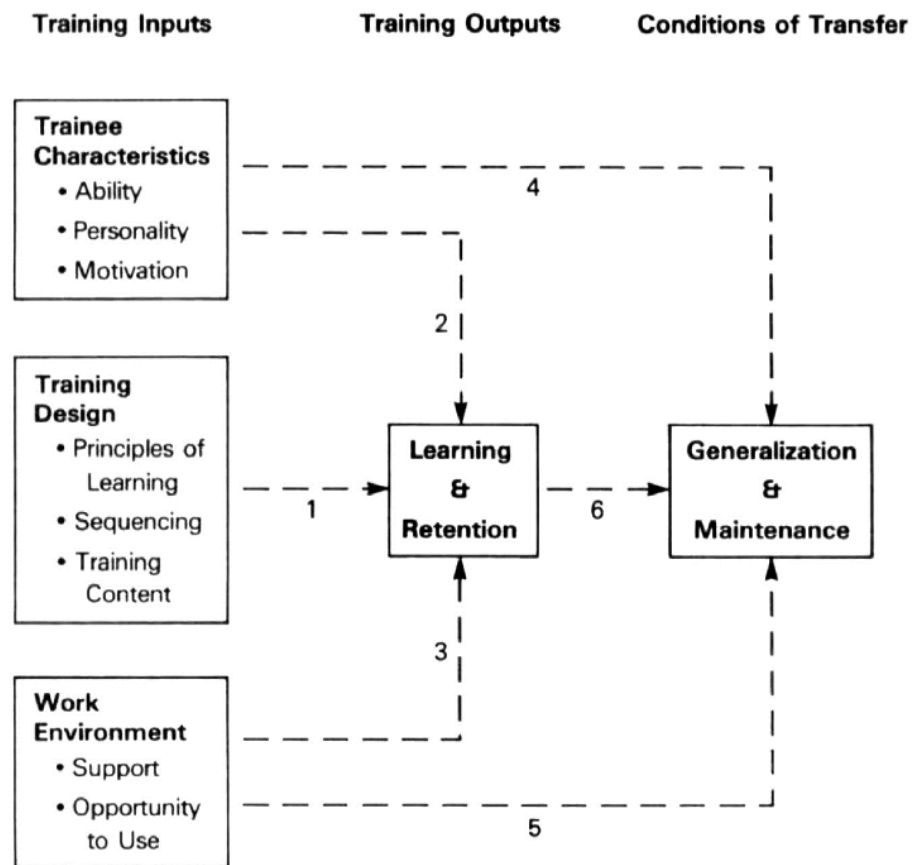
adaptable and capable professionals across various disciplines (Biech, 2017; Blume et al., 2009; Baldwin & Ford, 1988).

Transfer of Training Models and Motivation

Baldwin and Ford (1988) recognized personal factors, program design, and the environment as key influences on learning, retention, and skill application. Their seminal research introduced the concept of transfer of training models, laying the groundwork for understanding how training effectiveness translates into workplace performance. Holton (1996), expanded on this framework and emphasized the role of motivation, individual differences, and workplace environment in shaping learning transfer. More recently, Cheng and Hampson (2008) and Sanders et al. (2015) reinforced the idea that trainees demonstrate behavioral change by applying newly learned concepts in real job contexts. However, this transfer is not automatic—it is discretionary, meaning trainees must choose to integrate training outcomes into their roles. This underscores the critical role of intention and motivation in learning transfer (Na-Nan & Sanamthong, 2019).

Figure 2

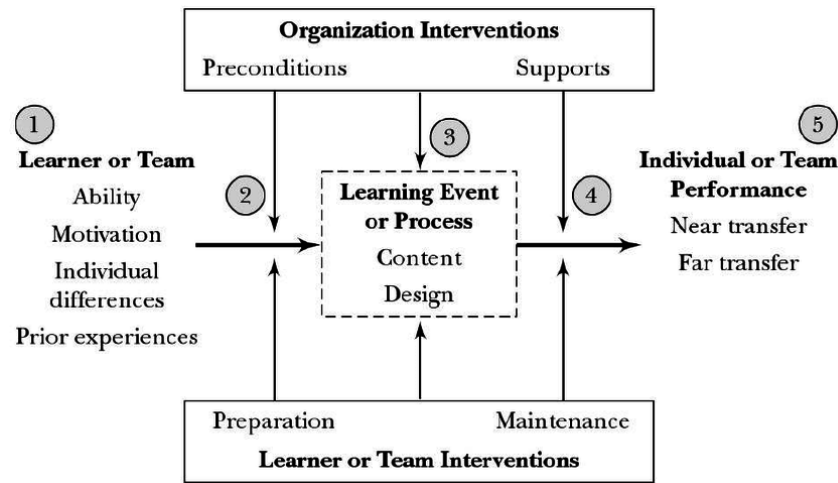
Baldwin & Ford (1988) Model of Training Transfer



Note: Adapted from Wenzel & Cordery (2014)

Figure 3

Holton & Baldwin's (2003) Conceptual Model of the Transfer Process



Note: Adapted from Wenzel & Cordery(2014)

Training transfer is influenced by three interdependent factors: training design, trainee characteristics, and work-environment factors as seen in figure 2 (Baldwin & Ford, 1988). This aligns with Illeris's (2009) three dimensions of learning—content, incentive, and environment—which collectively determine how individuals process and apply knowledge. The content dimension refers to the knowledge and skills acquired, highlighting the need for structured instructional design that ensures optimal retention and application. The incentive dimension relates to learner motivation, emotional engagement, and self-efficacy, mirroring research on trainee characteristics such as engagement, willingness to learn, and perceived practicality of training. Finally, the environment dimension captures social and organizational factors, emphasizing the importance of managerial support, workplace opportunities for practice, and an organizational culture that values learning. Understanding training transfer through this multidimensional framework enables organizations to develop training programs that not

only impart knowledge but also create a supportive ecosystem that maximizes long-term application of skills.

Competency-Based Training and Post-Training Reinforcement

Sultan et al. (2025) expanded on the foundational training factors outlined by Baldwin and Ford (1988)—trainee characteristics, training design, and work environment—by emphasizing the role of competency-based education (CBE) and structured post-training reinforcement in supporting effective learning transfer, particularly in high-stakes sectors like healthcare and community services. Their scoping review examined a wide range of CBE programs for community health workers, identifying best practices for designing training that explicitly links learning objectives to measurable skills and job-specific competencies. The study highlighted the critical importance of aligning training content with real-world performance standards and using post-training supports such as coaching, feedback loops, and peer mentoring to sustain learning. This directly aligns with research by Ford et al. (2017), who argue that training effectiveness increases when programs incorporate clear objectives, ongoing assessments, and reinforcement mechanisms that promote skill retention and practical application in the workplace.

Sultan et al. (2025) further highlighted the necessity of structured post-training reinforcement, demonstrating that without continuous engagement and follow-up, even well-designed training programs can fail to achieve long-term impact. This aligns with Biech (2017) and Taylor (2022), who emphasize that learning transfer is not a singular event but a process that requires ongoing reflection, workplace integration, and managerial support. Organizations that prioritize structured follow-ups, coaching, and

performance assessments can significantly enhance training effectiveness, ensuring that knowledge is not just acquired but actively applied in professional contexts.

The Role of Motivation in Learning Transfer

In training design, research has consistently shown that trainees are more likely to apply knowledge when training is engaging, enjoyable, and directly relevant to their professional roles (Huang et al., 2015; Blume et al., 2010; Biech, 2017). Enjoyable learning experiences often lead to higher levels of motivation, emotional engagement, and openness to new ideas—all factors associated with improved retention and transfer. However, there is an ongoing debate regarding whether enjoyment alone is sufficient to drive meaningful learning outcomes. Stolovitch and Keeps (2002) challenged this assumption, cautioning against what they call the “entertainment fallacy” in training. Their work argued that while learners may feel satisfied with enjoyable sessions, enjoyment by itself does not guarantee knowledge acquisition or behavioral change. Instead, they emphasized that effective training must be purposeful, performance-based, and clearly linked to job-relevant outcomes. In contrast, Biech (2017) acknowledged that while enjoyment may not directly enhance cognitive retention, it plays an important supportive role by increasing learners’ willingness to engage with the material, which in turn facilitates acceptance and on-the-job application. Together, these perspectives highlighted the need to balance engaging delivery with substantive, outcomes-driven content in training design.

Moreover, when trainers effectively deliver realistic, competency-driven, and contextually relevant training, learners are more likely to perceive the material as valuable, increasing acceptance and subsequent application. Sultan et al. (2025)

reinforced this argument by demonstrating that competency-based education enhances motivation by providing trainees with clear, measurable goals and practical reinforcement strategies. Their study found that when training programs included post-training evaluations, skill-based assessments, and structured follow-up interventions, learners demonstrated higher levels of confidence and application of skills in their professional environments. This highlights the importance of continuous engagement and feedback in optimizing training outcomes.

Workplace Factors and Training Transfer

The work environment plays a crucial role in shaping the effectiveness of training transfer (Baldwin & Ford, 1988). Trainees who are provided opportunities to implement new knowledge and skills quickly, receive supervisory encouragement, and work in a supportive climate are significantly more likely to successfully transfer learning to their professional roles (Blume et al., 2010; Ford et al., 2018). Sultan et al. (2025) reinforced this by demonstrating that organizational support structures—such as mentorship programs, competency checklists, and continuous skill evaluations—play a decisive role in reinforcing knowledge application. Their findings align with existing literature on training reinforcement, which emphasizes the necessity of structured workplace interventions to sustain learning outcomes (Na-Nan & Sanamthong, 2019).

From a constructivist perspective, trainees actively construct knowledge through experiences, interactions, and reflections, rather than simply absorbing information (Chuang, 2021). This means that learning transfer is most effective when training is designed to encourage active participation, critical engagement, and real-world contextualization. Sultan et al. (2025) further emphasize that competency-based training

models work best when paired with structured workplace reinforcement mechanisms, such as supervisor check-ins, collaborative learning communities, and skill verification assessments. By integrating these elements, organizations can create an ecosystem that not only fosters knowledge acquisition but also ensures its practical application in diverse professional settings. (Chuang, 2021; Sultan et al., 2025)

The transfer of training models outlined by Baldwin and Ford (1988), Holton (1996), and Illeris (2009) provide a comprehensive framework for understanding how learning is retained and applied in the workplace. However, recent research by Sultan et al. (2025) reinforces the idea that competency-based education and structured post-training reinforcement are essential for ensuring long-term learning transfer. Their findings support the notion that clear learning objectives, skill-based competency assessments, and structured follow-up mechanisms significantly enhance training effectiveness. (Chuang, 2021; Sultan et al., 2025)

Moreover, motivation plays a pivotal role in learning transfer, with training relevance, engagement, and workplace reinforcement serving as key factors in skill application (Baldwin & Ford, 1988; Burke & Hutchins, 2007). The integration of structured workplace interventions—such as mentorship programs, ongoing feedback, and competency tracking—ensures that learning is continuously reinforced and adapted to real-world contexts (Ford, Baldwin, & Prasad, 2018; Grossman & Salas, 2011). As organizations and educational institutions shift toward competency-driven training models, the need for comprehensive, structured reinforcement strategies becomes increasingly evident (Sultan et al., 2025; Blume et al., 2009). By embedding long-term engagement mechanisms into training programs, organizations can ensure that learning

transfer is not just a temporary outcome but a sustained, impactful process that enhances professional development and workforce capability (Biech, 2017; Bandura, 1997).

Conclusion

Training for adults is a dynamic and multifaceted psychological process that extends beyond the simple acquisition of knowledge (Merriam & Bierema, 2013). The successful transfer of learning into real-world applications is contingent on a combination of factors, including learner motivation, training design, work environment, and post-training support mechanisms (Baldwin & Ford, 1988; Burke & Hutchins, 2007; Ford et al., 2018). Motivation plays a critical role, as trainees who perceive training as relevant and valuable are more likely to engage with the content and apply it in their professional roles (Bandura, 1997; Ryan & Deci, 2000). Additionally, the presence of structured reinforcement mechanisms, such as post-training messaging, coaching, and supervisor support, significantly enhances the retention and transfer of acquired skills (Biech, 2017; Blume et al., 2009; Grossman & Salas, 2011).

The training transfer process is further enriched by theoretical frameworks such as constructivism and Illeris's three dimensions of learning, which emphasize active engagement, contextual learning, and a supportive environment (Chuang, 2021; Illeris, 2009). Constructivist learning theory suggests that knowledge is actively built through reflection, practice, and experience, reinforcing the idea that learning transfer is not a singular event but a continuous developmental process (Perkins & Salomon, 1992; Katz & Halpern, 2015). Similarly, Illeris's model highlights the interdependence of content, motivation, and environment, illustrating how the effectiveness of training is directly

linked to an individual's emotional investment, perceived utility of knowledge, and access to real-world application opportunities (Illeris, 2009; Chuang, 2021).

The military's approach to faculty development and professional education exemplifies these principles in action, demonstrating that structured instructor training, ongoing professional development, and institutional support are crucial for fostering a culture of learning and self-actualization (JCS Vision & Guidance for Professional Military Education, 2023; U.S. Marine Corps & Berger, 2020; Van Baarle et al., 2015). By investing in instructor transformation—from subject matter experts to skilled educators—military education has positioned itself at the forefront of learning transfer strategies, ensuring that training methodologies evolve alongside workforce needs (Schatz et al., 2012; Hampson & Taber, 2020). This shift reflects a broader trend in education and workforce development, where organizations increasingly recognize the need for continuous learning, adaptability, and instructor competency to drive organizational success (Bernhardt, 2015; Kereluik et al., 2013).

Ultimately, effective learning transfer is not only about retaining information but also about fostering confidence, readiness, and willingness to apply it in real-world scenarios (Na-Nan & Sanamthong, 2019; Huang et al., 2015). Organizations and educators must cultivate an environment that supports lifelong learning, encourages self-efficacy, and prioritizes structured reinforcement mechanisms (Bandura, 1997; Biech, 2017). By doing so, they ensure that training remains a valuable investment—one that empowers learners, strengthens workforce capability, and drives sustained professional growth (Blume et al., 2009; Ford et al., 2018).

While a substantial body of literature focuses on the effectiveness of training in transferring knowledge from educators or training staff to students and employees, relatively little attention has been paid to how training is received, accepted, and implemented by the instructors themselves. Across the literature, a recurring trend is the emphasis on outcomes for the learner population—whether civilian professionals, military personnel, or students—without sufficient exploration into the experiences and learning processes of those responsible for delivering the training (Blume et al., 2009; Bernhardt, 2015). This reveals a clear gap in current research: the lack of understanding around how training staff internalize, accept, and integrate instructional practices and new procedures into their professional roles. This gap is particularly significant because organizations—especially in high-stakes environments such as the military, healthcare, and technical fields—depend heavily on instructors and facilitators to serve as conduits for new knowledge, systems, and procedures (Sultan et al., 2025; Hampson & Taber, 2020). If the training staff themselves do not successfully acquire, accept, and apply the learning content, the broader workforce cannot be expected to do so either (Biech, 2017; Baldwin & Ford, 1988). Understanding learning transfer from the perspective of instructors is therefore essential for developing effective, sustainable training systems that support organizational improvement and adaptability (Burke & Hutchins, 2007; Ford et al., 2018).

Chapter Three: Methods

This chapter details the methodology used in the study, including the research design, data collection process, and analytical approach. The chapter outlines how participants were selected, how data was gathered and analyzed, and the strategies implemented to ensure credibility and reliability in the findings.

Research Design

This study employed a qualitative research design using a case study approach to explore the impact of the Facilitating Learning Experiences (FLEX) course on students' learning and its subsequent application in their professional environment. A case study approach was selected to provide an in-depth, contextualized understanding of how students interact with faculty, perceive their learning experiences, and apply newly acquired knowledge and skills in real-world settings (Yin, 2018).

Data collection was conducted through in-person interviews at a single school and course, capturing students' experiences, perceptions, and reflections both during and after completing the FLEX course. The first phase of data collection focused on students' immediate reactions to the course, their interactions with faculty, and their initial impressions of the instructional methods and course content. The second phase of data collection occurred after students returned to their formal learning centers (FLCs), where they were interviewed about their ability to apply course concepts in their instructional roles and challenges faced in the transfer of learning.

Additionally, faculty perspectives were gathered to gain insight into course objectives, instructional strategies, and their perceptions of student engagement and learning outcomes. Observations of student discussions, classroom dynamics, and interactions with faculty were also incorporated to provide additional context regarding

the challenges and facilitators influencing the learning process. These observations allowed for a more comprehensive understanding of the course's impact beyond self-reported data.

By employing multiple data sources—interviews, faculty perspectives, and classroom observations—this study seeks to capture a holistic view of the learning experience within the FLEX course and its role in enhancing instructional effectiveness and knowledge transfer in military education.

Sample Population

The target population for this research consisted of Marine Corps Formal Learning Center (FLC) instructors, representing a diverse cross-section of military personnel, including both officers and enlisted Marines. These individuals were enrolled in the instructor development course for either introductory or advanced training. The population represents a convenience sample, as students were assigned to the course by their respective units rather than selected by the researcher. Enrollment in the course is a mandatory prerequisite for obtaining an instructor billet, and there is no formal selection process for instructors across the broader force (Training Command, n.d.). However, due to the limited number of instructors attending the designated schoolhouse during the study period, this specific cohort became the primary focus of the research.

The sampling approach for both observations and interviews was non-probabilistic and convenience-based, given that data were collected from an existing course cohort rather than a researcher-selected group (Yin, 2018; Merriam, 1998). Participants for observations were determined by their availability within the training environment, while interviewees were self-selected volunteers who responded after the

researcher extended an invitation in accordance with IRB protocols. Convenience sampling, which involves selecting participants based on accessibility and willingness to participate, is often used in qualitative research where the focus is on gaining in-depth insights rather than generalizability (Merriam, 1998). In addition, snowball sampling was used in an attempt to increase the number of interview participants, with initial volunteers asked to refer other potential participants. However, this approach yielded only one additional interviewee, resulting in a modest expansion of the sample.

The anticipated sample will primarily consist of young male Marines, typically in their early to mid-20s, with limited instructional experience. Most are expected to hold the rank of Sergeant (E-5), which is only one rank above Corporal (E-4), reflecting an early-career stage in the military leadership structure. At this level, Marines are often transitioning from being direct task executors to emerging leaders and mentors within their units. As such, while they possess operational experience, many are novices in formal instructional roles, having recently been assigned or preparing to assume duties as instructors. This demographic characteristic is important, as it suggests that participants are still forming their professional teaching identities and may have varying levels of confidence and readiness to apply instructional methods, making them a relevant population for exploring training transfer and instructor development.

Enlisted Marines

Enlisted Marines typically join the Marine Corps shortly after high school without a college education. Their ranks range from Corporal to Master Gunnery Sergeant. They undergo a rigorous 13-week initial training, known as boot camp, before being assigned to various combat, technical, and support roles. Enlisted Marines are responsible for

executing the orders of their superior officers and are considered the backbone of the Marine Corps, making up the majority of its personnel (Department of Defense et al., 2021).

Corporal. A Corporal typically has three to four years of service, is between 20 to 25 years old, and has completed basic training. Corporals often have experience with a single unit and have a foundational understanding of military operations (Department of Defense et al., 2021).

Master Gunnery Sergeant. A Master Gunnery Sergeant usually has 25 to 30 years of service and is between 45 to 50 years old. They have served in multiple units, held leadership roles, completed deployments, and attended advanced military schools. This rank represents the highest levels of enlisted leadership (Department of Defense et al., 2021).

Officers

Marine Corps officers are college-educated individuals who undergo a 10-week selection process, followed by six months of initial officer training. Afterward, they are assigned a specialized role. Officers are responsible for Marine units' leadership, management, and overall direction. They plan military operations, make strategic decisions, and ensure the welfare, training, and performance of the Marines under their command. Officer ranks range from Captain to Colonel (Department of Defense et al., 2021).

Captain. A Captain typically has five to ten years of service, is between 25 and 30 years old, and has completed basic training and some advanced military education. Captains usually serve in leadership and staff roles, managing smaller units and participating in operational planning (Department of Defense et al., 2021).

Colonel. A Colonel usually has 25 to 30 years of service and is between 45 to 50 years old. They have served in multiple units, held significant leadership positions, completed deployments, and attended advanced military and civilian graduate-level education programs. Colonels are senior leaders responsible for commanding large units and overseeing substantial operations (Department of Defense et al., 2021).

Research Process

Institutional Review Board (IRB) approval was sought and granted for this study (Appendix A), ensuring that all ethical considerations were met. Participants were informed of the research purpose and process, including potential risks, and were required to sign informed consent documents. The FLEX course consisted of 36 students and was conducted over two weeks on campus and a short online portion for the students to complete before arriving at the facility. The FLEX class was approached after the first week on campus, at which point they were briefed and invited to voluntarily participate by sharing their experiences. The researchers goal was to gather five participants per the IRB. This timing allowed students to have substantial exposure to the course content before being asked for feedback.

Convenience Sampling

This research utilized a non-probability sampling method, expressly convenience sampling, due to the practical time and availability constraints. Convenience sampling

was chosen because the researcher needed to rely on willing and available participants to contribute within the limited timeframe for conducting interviews and processing qualitative data. Given these constraints, it was necessary to focus on those individuals who actively chose to engage, though this approach inherently limits the diversity of the sample (Merriam, 1998).

Data Collection

Six students volunteered for face-to-face interviews, with four participating in follow-up phone interviews to provide longitudinal insight into their learning experience and application of training. Additionally, four faculty members at MCLFD also volunteered to participate in in-person, semi-structured interviews. These interviews were designed to capture a range of perspectives from both student and faculty participants, offering a more comprehensive understanding of the instructional process and learning transfer. To enhance data credibility through triangulation, the interview data were supplemented by field notes taken during classroom observations and a detailed review of course materials, including lesson plans, presentation content, and training objectives. This multi-source approach allowed the researcher to validate emerging themes, cross-reference participant accounts, and build a more robust and well-rounded depiction of the instructional environment and its impact on learning transfer.

Faculty

The faculty participants had varied experience levels, offering a broad spectrum of insights into the course. Two instructors volunteered for interviews, one of whom had been teaching for several years, while the other had joined the course only six months prior to the study. In addition, the course chief provided an interview, adding a leadership

perspective that allowed the researcher to place FLEX in the context of the larger MCCLFD and TECOM mission. The diversity of faculty perspectives, particularly regarding teaching experience, enriched the qualitative data by offering different viewpoints on the course's objectives and implementation.

Students

The six student volunteers represented the FLEX course participants, reflecting the broader population of military instructors who attended the program. The observed class had a predominance of enlisted individuals, with only one officer (a Captain) and three civilians out of the 36 students. The majority of students were enlisted Marines, many of whom are responsible for fulfilling critical instructional roles at their respective FLCs. Some of the students in the course were also incoming faculty members for the FLEX program. This provided additional insights into how new instructors perceive the course and its potential impact on their future teaching. The student group thus offered a range of experiences and backgrounds, contributing to a comprehensive understanding of the course's influence on military education.

Conclusion

Chapter Three outlined the methodological framework for this study, detailing the qualitative case study approach, data collection methods, participant sampling, and research procedures used to explore the impact of the Facilitating Learning Experiences (FLEX) course. By employing interviews, observations, and faculty perspectives, this study sought to capture the complexities of learning transfer and instructional development within military education. The chapter also addressed the characteristics of the study population, including the experience levels of instructors, the demographics of

participants, and the structural constraints of data collection, such as the reliance on convenience sampling and the limited scope of the observed cohort.

In conclusion, this qualitative case study explored the experiences and perceptions of both students and faculty participating in the FLEX course at a Marine Corps Formal Learning Center (FLC). By employing methodological triangulation—including in-person interviews, classroom observations, and field notes—the study captured a multifaceted view of the learning environment. This triangulated approach enhanced the trustworthiness of the findings and provided a richer understanding of the complexities involved in transferring course content to real-world instructional settings. The integration of multiple data sources allowed for a more nuanced analysis of how participants engage with, interpret, and attempt to implement the training in their roles as instructors.

Chapter Four presents the study's findings, offering an analysis of the collected data and key themes that emerged from participant experiences. Additionally, Chapter Four will examine patterns in learning transfer, levels of instructional confidence, and the factors that influence knowledge retention and application over time.

Chapter Four: Findings

The focus of this research study was to explore the transfer of learning among Marine instructors (adult learners) at the Marine Corps Center for Learning and Faculty Development (MCCLFD) during the Facilitating Learning Experiences (FLEX) course. The study addressed two central research questions:

RQ (1): What are the experiences and perceptions of military school instructors in a faculty development school course?

RQ (2): What are the experiences and perceptions of military school instructors on implementing training from a faculty development school course?

Context

The data collection process encompassed in-person interviews, observations, gathering course materials, personal conversations, and follow-up virtual interviews. The researcher gathered initial data through on-site interviews, notes, and observations at the Marine Corps Center for Learning and Faculty Development (MCCLFD). These were supplemented with follow-up Zoom interviews to gain a comprehensive understanding of the course's impact. The interviews targeted both students, who were military instructors, and the faculty of MCCLFD, focusing on the primary population of interest: military instructors.

The observations were conducted over the course of one week during a Facilitating Learning Experiences (FLEX) course with days lasting from six to fourteen hours a day, which included formal instructional sessions, interactive discussions, and informal exchanges within the facility. This setting provided a rich environment to

examine the dynamics between instructors and students and the practical application of the course material in real-time.

Each student participated in two interviews, where they shared their perspectives on the course content, their experiences with implementing 21st-century learning strategies, and the extent to which they could apply these concepts in their formal instructional roles. When interviews with faculty and student instructors yielded critical insights into the essential components of the FLEX course. The data collected highlighted key takeaways for participants, identified challenges encountered, and documented improvements made to the course based on feedback from previous iterations.

The observational components proved particularly valuable, offering a firsthand view of the learning environment and participant interactions. The researcher observed meaningful exchanges between students and faculty, including roundtable discussions and peer-to-peer interactions. Through the early observations the researcher was able to direct his interviews in a more pointed way. Some of the most significant insights emerged during informal conversations with students who approached the researcher between classes. These discussions shed light on the learning transfer process, peer-led dynamics, and the perspectives of individuals initially resistant to the course material. Such candid moments revealed not only the challenges of implementing new instructional strategies but also the resilience and adaptability of the participants in navigating these changes.

This multifaceted data collection approach provided a robust foundation for analyzing the FLEX course's effectiveness and impact on military instructors' professional development.

Description of Sample

The sample consisted of four faculty members and six students representing a diverse range of demographics, as outlined in the Table 1 below. The faculty were recruited prior to the researcher's arrival through the MCLFD OIC via email. He ensured that the faculty volunteers had a varied level of experience. The students were recruited by the researcher upon his arrival by introducing the research to the course and asking for volunteers.

Table 1*Demographics of Faculty and Students Interviewed*

Category	Faculty (n=4)	Students (n=6)
Gender		
Male	2	4
Female	2	2
Age		
20-30	0	4
30-40	2	1
40+	2	1
Rank		
Enlisted	1	4
Officer	0	1
Civilian	3	1
Position		
Junior Instructor	1	4
Senior Instructor	1	1
Staff	2	1
Years of Service/ Years in Education		
01 – 10	0	4
10 – 20	1	1
20+	3	1

Notably, the majority of student interviewees are young, enlisted males with limited time in service, whereas the faculty members are older and possess significant experience (see Table 2 below). Observations of the full faculty and students enrolled in the course captured additional key demographics. The following information about the course and faculty is approximate.

Table 2*Demographics of the Course Attendees and Staff*

Category	Faculty (n=16)	Students (n=36)
Gender		
Male	8	26
Female	8	10
Age		
20-30	1	20
30-40	7	12
40+	8	4
Rank		
Enlisted	4	30
Officer	1	1
Civilian	10	5
Position		
Junior Instructor	3	27
Senior Instructor	5	3
Staff	8	6
Years of Service		
01 – 10	2	27
10 – 20	7	7
20+	7	2

Note: This table presents the demographic composition of the staff and students at MCCLFD during the researcher's observation period. The data was gathered through direct observations and informal conversations over the course of the week. These figures were intended to provide context for the field notes by illustrating the general makeup of the participants.

Actual Participants

Participants were recruited on a voluntary basis. Each received an Auburn University IRB Information Letter, stamped with the official IRB approval. A total of ten individuals participated, including four faculty members and six students (see Tables 3 and 4 for Participant Descriptions).

Table 3*Student Experiences and Mindset*

Student 1	Student 2	Student 3	Student 4	Student 5	Student 6
New to Unit	New to Unit	Been with unit 5+ years	20+ year career	New To unit	New To unit
New Instructor	New Instructor	Instructor and curriculum developer In role for 3+ years	New to Role as Course Chief	New Instructor	New Instructor
Positive mindset	Negative Mindset coming into Course	10 + Years of experience	Previous Instructor Experience	Negative influence from peers	Negative influence from peers
Excited about using 21st Century Learning	Left excited about using 21st Century Learning	Volunteered for course Positive mindset	Embraced learning the new methodologies	Positive influence from Supervisor	Negative Mindset, Lacks experience, Argumentative
Open and questioning		Did not participate in Follow up	Volunteered for Cours	Positive mindset	Did not participate in Follow up

Table 4*Faculty Experiences and Mindset*

Faculty 1	Faculty 2	Faculty 3	Faculty 4
With MCCLFD less than 1 year	More than 30 years teaching experience	More than 25 years military experience	Less than 5 years teaching experience
Served as an instructor at a previous FLC	PHD in Education	No civilian degrees or experience in education	PHD in Education
15 years of experience			
No civilian degrees or experience in education	Has been with MCCLFD for over 10 years	Taught at multiple FLCs in Military	Less than 1 year with MCCLFD
	Taught multiple different courses	Almost 10 years of teaching experience	No Previous Military Experience
		2 years with MCCLFD	

Semi-Structured Interviews

The study used in-person interviews conducted via Zoom with video disabled, as per the IRB to minimize the risk of a breach of confidentiality. Zoom was utilized to record the audio and generate transcripts. Each participant was asked the same set of questions to ensure consistency across interviews (see Appendix C), allowing for reliable comparisons of responses and the identification of common themes or patterns. This standardized approach also helped minimize interviewer bias and supported the study's goal of capturing a comprehensive and balanced understanding of participants' perceptions and experiences. Participants were assured of their anonymity in the reporting of findings. No video recordings were made, names were omitted from all

documentation, and all interview summaries and notes were labeled using numerical identifiers to protect individual identities. At the end of each interview, they were given the opportunity to review and clarify their responses.

Interviews were recorded using Zoom and summarized through Zoom's AI feature. Hard copies of the transcripts were printed for coding purposes. Before beginning open coding, I set aside personal experiences and potential biases, particularly those related to my military background and experiences with FLCs, to ensure an objective analysis.

Before starting each Zoom recording, I reminded participants of their voluntary participation and right to withdraw at any time. I informed them when the recording would begin and asked the IRB-approved questions, following up when necessary for clarification. Participants were also asked to explain any acronyms they used. At the end of each interview, they were invited to revise or elaborate on their answers. Recordings stopped only after participants confirmed they had no further input.

Emerging Themes

After reviewing all interview notes, Zoom interview summaries, course observations, field notes, and course documents for emerging patterns, the researcher identified seven themes related to the transfer of learning among the students. Upon further analysis, these themes aligned with the Baldwin and Ford (1988) training transfer model and were organized under its three core dimensions: trainee characteristics, training design, and work environment.

- Trainee Characteristics (Internal Factors)
 - Trainee Motivation and Its Dependence on Perceived Topic Relevance

- Trainee Resistance to Change
- Training Design (Event)
 - The Role of Course Design in Facilitating Trainee Interactions Despite Initial Challenges in Motivation
 - The Connection Between Trainee Motivation and Engagement Through the Use of Their Own Course Materials
- Work Environment (External Factors)
 - The Influence of Peers
 - Policy Implications
 - The Influence of Supervisors

Organization

Each major theme in this study is presented individually, with a brief explanation preceding the discussion. To illustrate the significance and prevalence of each theme, multiple direct quotations from interview participants across various roles are included as supporting evidence, along with field observations and notes to provide data triangulation.

To maintain participant anonymity, each individual was assigned a generic title and corresponding number. Student participants are identified as “Student” followed by a number (e.g., Student 1–6), while faculty members are labeled as “Faculty” followed by a number (e.g., Faculty 1–4). Any additional observations are documented as field notes.

Theme One: Trainee Characteristics (Internal Factors)

Trainee Motivation and Its Dependence on Perceived Topic Relevance

Some students expressed concerns that the course content did not directly apply to their specific Faculty Learning Centers (FLCs). They struggled to understand how to integrate the instructional techniques and strategies discussed into their unique teaching environments.

"I have a very technical MOS (military occupational specialty) that relies heavily on problem-solving and practical learning. Wargaming and this other stuff (21st-century learning concepts) won't help me teach them how to manage networks."
— Student 6

"They are trying to push the stuff from the course, but the students don't know anything, so it makes no sense to discuss it. It's a waste of time. These kids are dumb—I have to force the information on them." — Student 6

"I'm never going to use this to teach my guys. We just have to go out and do it."
— Field Notes

A recurring theme among those who were resistant to the course material was a lack of empathy toward their students. These individuals often attributed learning challenges to their students' perceived deficiencies rather than considering how instructional strategies could be adapted to support different learning needs.

"Kids these days just don't care like they should. They need to be taught what I know. Back in my day, we were expected to know the material and make it work." — Field Notes

"My students don't know the material a discussion will never work." — Student 6

Additionally, several students focused on the specific delivery methods used in the course rather than the broader instructional concepts and strategies that could be adapted for different environments.

"We don't have all of those large pads at my schoolhouse—we would never be able to do a chalk walk that way. How are kids who have never managed a network supposed to give examples of issues they've encountered?" — Student 6

"One of the biggest critiques I see with wargaming is that students get wrapped up in the game. They don't see the concepts being taught. They just think, 'How is a game about war going to help my MOS?'" — Field Notes

Despite these critiques, faculty members observed that students who were motivated and open to change were able to successfully implement new instructional strategies. While there were no insurmountable barriers to adapting the material, the ease of implementation depended largely on the trainees' willingness to engage with new teaching methodologies.

"I see change happening, but it's the students with motivation and passion that make it happen. There are no insurmountable roadblocks, but water follows the easiest path." — Faculty Member 2

Trainee Resistance to Change

A subset of students expressed a strong belief that traditional instructional methods—such as PowerPoint presentations, textbooks, and lectures—were sufficient for preparing students. These individuals resisted adopting or exploring 21st-century learning strategies, viewing them as unnecessary or overly complex.

"How do the students get the material if we just explore and discuss it? They will not get the material if I do not tell them." — Field Notes

"You can see the students who know better. They complain about their instructors but want us to teach them the same old stuff. They think they can do something better instead of trying something new." — Field Notes

When discussing the course, these students often exhibited a closed-minded perspective, frequently referencing peers who had dismissed the course as a "waste of time" or recalling personal experiences where they had learned effectively through traditional instruction. These individuals generally placed the responsibility for learning solely on the students, rather than recognizing the instructor's role in creating an effective learning environment and understanding learning.

"A lot of this, especially the wargaming, was a waste of time." — Field Notes

In contrast, some students embraced the implementation of 21st-century learning techniques and observed varying reactions from their peers. One student, in particular, noted the conflicting attitudes within their group.

"I have another guy from my FLC here, and all he wants to do is talk about how dumb the course is—but then he has these grand ideas of teaching just like we're doing it in class. He just thinks everyone should already know our job before school." — Student 5

This student further elaborated on how peer influence shaped initial perceptions of the course:

"A lot of his friends told us before coming that the school was stupid and just a waste of time. But a few of the SNCOs pulled me aside and told me to focus, and when we get back, I'll see the difference." — Student 5

Over time, the student noticed a shift in engagement among peers, particularly due to the influence of senior leadership and faculty.

"When I'm around them, they talk badly about the course, but one of them is starting to get into it. The SNCOs really push it, so life is easier when you play ball, and I'm cruising through my qualification compared to other students." — Student 5

While some colleagues initially ridiculed engagement with twenty-first century learning strategies, this student found encouragement from supervisors who supported and reinforced the value of these methods. Over time, they observed a gradual reduction in peer criticism and a growing acceptance of the techniques, largely driven by leadership's consistent advocacy for instructional modernization.

Theme Two: Training Design (Event)

The Role of Course Design in Facilitating Trainee Interactions

During the interviews, many students commented on the course layout, highlighting its effective structure and its integration of 21st-century learning techniques. The course introduced these methods through a combination of explanation and faculty demonstration, which students found particularly beneficial.

"I felt overwhelmed last week. It was like a firehose coming at me, but after processing it and getting into the presentations this week, I'm surprised by how much I remembered." — Student 1

"Now that I'm back at my unit its interesting seeing how FLEX was laid out compared to how we do it. Its interesting the things you notice after learning about it." — Student 4

Faculty members acknowledged that the course was deliberately structured to immerse students in a large volume of information during the first week, often described as a "firehose" effect. This approach was intentional, allowing students to process the material over the weekend before transitioning to facilitation-based learning.

"The course is designed to overwhelm the students in the first week with a firehose of information, then let them facilitate their material. ... Yes, the weekend is intentional; that time to let them process helps before we come into the week where we let them facilitate." — Faculty Member 3

Many students initially described feeling overwhelmed by the sheer volume of content in the first week. However, they also recognized that the weekend break provided a valuable opportunity to process the material, ultimately enhancing their preparedness for the second week's application-focused sessions. The transition from intensive information delivery to hands-on faculty demonstrations and student-led facilitation proved to be an effective structure for the FLEX course. Even those who initially expressed frustration with the course design later acknowledged its effectiveness in deepening their understanding. Participants frequently emphasized the alignment between instructional content and delivery methods as a key strength of the program.

"This course was a waste of time... doing the assignments was easy. We got all the information in the first week, and the instructors demonstrated everything." — Student 6

"The first week was overwhelming. We were here late every night, and I didn't see the point in any of the information. But after the weekend, when I had time to process, it started to come together. Then, when we started presenting, it all made sense to me." — Student 2

Connection Between Motivation and Engagement - Course Materials

Prior to attending the FLEX course, students were required to complete preparatory online training and compile a Master File, a set of instructional materials related to a specific class they would be responsible for teaching. This file included handouts, presentations, and instructor guides and served as a foundational resource throughout the course. Students utilized their Master Files during presentations and assignments, allowing them to work with familiar, real-world materials that they would later apply in their own Faculty Learning Centers (FLCs).

"I hated the idea at first because I had just gotten there. But it was nice getting to get in-depth with the material before getting to the schoolhouse (back to work)." — Student 1

Many students contrasted this approach with previous training experiences that used generic, unfamiliar materials. They noted that working with their own instructional content allowed them to focus on refining their presentation skills rather than struggling to understand unfamiliar material.

"I have done courses before with some generic material that no one knows, and it just didn't work. This was awesome—having the time to dive into my material and get feedback on how I'm presenting stuff I know, instead of worrying about knowing the material and not getting feedback on my presentation skills." — Student 4

Faculty members also emphasized that using personalized materials increased student engagement and facilitated their acceptance of new instructional methods.

"Using their own Master File gets them to buy into the process of change because we help them do 90 percent of the work—they just have to implement it." — Faculty Member 2

"We have generic Master Files for those who don't have one or forget, but you can definitely see a difference in student buy-in and understanding when they have their own material." — Faculty Member 1

Although some students were initially hesitant about using materials from their respective FLCs, they later recognized the value of this requirement. Initially perceiving it as cumbersome, they ultimately found that engaging with their own instructional content allowed them to develop greater confidence in manipulating and delivering the material.

"I thought it was weird bringing a file I had never taught, but after presenting out of it, I felt a lot more comfortable manipulating it because I knew the information instead of having to read something and then figure it out." — Student 2

"I remember not liking it at the course but now that I'm back at the FLC its nice having already gotten into the material and having updated it with the new techniques as that's about to be my job updating everything." — Student 3

Theme Three: Work Environment (External Factors)

The Influence of Peers

The impact of peer influence on students' motivation and willingness to engage with the course material was a recurring theme during interviews and observations. Whether through direct responses to the researcher or casual comments made by passing students, it was evident that many trainees mirrored the attitudes of their peers regarding the course's value.

"Before I came, I had multiple people tell me to dump everything before coming back because that fancy stuff doesn't work." — Student 6

"The others with me told me they heard it was a waste of time." — Field Notes

For some trainees, the prevailing sentiment within their Faculty Learning Center (FLC) shaped their initial outlook on the course.

"No one back at my unit (FLC) uses this (stuff). We get them the information, get hands-on, then get them to the Fleet (Marine Units)." — Field Notes

Conversely, trainees from units that had recently adopted 21st-century learning methods exhibited a more positive attitude, often influenced by leadership or peers who had already embraced the instructional approach.

"Our unit (FLC) is all about 21st-century learning. I remembered all my new guys being really good before going to the FLC. When I got there, everyone told me about the course and how great it was. They made the switch recently and love it." — Field Notes

"I wasn't sure what to expect because I got orders late and only got to my FLC days ago, but everyone I talked to told me to pay attention here." — Student 1

"A SNCO pulled me aside and told me to focus while here." — Student 5

Students who were encouraged to take the course seriously generally exhibited a more engaged and receptive attitude, while those who had been discouraged from valuing the course tended to be more dismissive. However, the researcher observed that multiple students who initially resisted the course ultimately became excited about the techniques and their potential applications.

"I didn't want to come because I heard bad things at my home unit, but once I got to the schoolhouse (FLC), the OIC and everyone else told me the school had changed and that I would love it. So, I was excited, although nervous about how quickly I got here." — Field Notes

Peer influence was not limited to pre-course perceptions; it also played a significant role during the course itself. The 36 students were divided into six groups, creating an environment where peer interactions continued to shape attitudes. One notable example involved three students, the same FLC, all of whom initially believed that 21st-century

learning concepts were not applicable to their field. However, since they were placed in different groups, their experiences varied. *None of these students volunteered for an interview therefore they will be referred to as Student A, B, and C instead of numbered.*

- **Student A** was in a group with motivated peers, including one who had previously attended the course.
- **Student B** was in a group with individuals who had mixed feelings about the course.
- **Student C** was in a group with two others who dismissed 21st-century learning as irrelevant and an older student who openly opposed the course, believing experience alone was sufficient for effective instruction.

The contrasting dynamics of these groups provided insight into the powerful role of peer influence. One group, predominantly composed of students resistant to change, quickly developed a negative group dynamic. Charismatic individuals led the group away from engagement, undermining any enthusiasm for the material. Despite completing all course requirements, these students demonstrated no intention of applying what they had learned.

"We got the basics—let's get out of here. We're not using this after this week." — Field Notes

"Hey (researcher), come on, there is no way to use this. Maybe for some fancy officer school." — Field Notes

"They don't care. The one just seems to think he knows better." — Field Notes

In contrast, the group containing Student A exhibited the opposite trend. Peers in this group actively supported one another in finding ways to adapt 21st-century learning techniques to their specific FLCs. This collaborative environment helped Student A

reconsider the applicability of the material, demonstrating how positive peer interactions could facilitate a shift in perspective.

This contrast underscores the impact peer influence has on trainees' motivation and openness to instructional change. While negative peer dynamics reinforced resistance, supportive environments helped skeptical students explore new methodologies with a more open mind.

Policy Implications

A significant challenge identified during the course was the presence of policy-related roadblocks that limited instructional flexibility. These obstacles often stemmed from binding contracts, institutional policies, and command directives that restricted the ability of instructors and leadership to implement changes, even when they recognized the need for adaptation.

"Not here, but at a school I was at before, we hired a company to come in and develop the curriculum a few years back. Now they have to teach that because of the contract, even though they found it wasn't working." — FAC 3

In this instance, an external agency had developed a curriculum for a larger schoolhouse under a binding contract. As a result, instructors, staff, and even Faculty Learning Center (FLC) commanders were unable to modify the curriculum during the contract period, regardless of their desire to adapt or improve the material.

Beyond contractual limitations, internal policies also played a significant role in shaping instructional methods. Some schoolhouses were influenced by civilian personnel whose instructional priorities did not always align with the needs of the operating units.

"Our schoolhouse has this civilian who bases the curriculum on what he remembers people being bad at, rather than consulting the units about what they actually need from the students. He's so out of touch—he just imposes orders and

a curriculum focused on his pet peeves, making life miserable for the units and instructors. In turn, the students arrive at the unit unprepared." — Field Notes

In other cases, official orders dictated not just the content of instruction but also the specific methods by which it had to be delivered. These mandates left instructors unable to implement new strategies without approval from higher command, which was described as a slow and infrequent process.

"At a previous unit (FLC), we had everything written out in an order that dictated exactly how to teach each class. When I used the Socratic method, they came after me. They didn't care how well my students were performing or about the learning outcomes—they just wanted to enforce their approach. For example, they mandated that students handwrite everything because 'that's how it's done in the field.' But this just wasted instructors' time, as we couldn't even read the handwriting or grammar. Why can't they type it so we can focus on the concepts we're teaching?" — FAC 3

While many students left the course feeling confident in their ability to apply 21st-century learning strategies, some recognized that cultural resistance and policy limitations could hinder their ability to implement these techniques in their respective units.

"I can't wait to get back into the classroom. I feel like this stuff is going to help me enjoy teaching. I'm more excited about this tour (time at the FLC) now. I wish they had been teaching like this when I went through the schoolhouse." — Student 1

"This stuff sounds like it's going to work in the classroom, but it's going to take a lot of effort to get everything changed. I need to get more people to this course so we can update our SOPs and orders." — Student 4

These insights highlight the importance of aligning policy with instructional best practices, ensuring that bureaucratic constraints do not impede the adoption of effective teaching methodologies. Without institutional support for innovation, even the most motivated instructors may struggle to implement meaningful change.

The Influence of Supervisors

One of the most insightful discussions occurred during a Fishbowl exercise, where students reflected on challenges they faced, including roadblocks imposed by supervisors. Through these discussions, it became clear that leadership played a critical role in shaping both the work environment and the willingness of trainees to adopt new instructional strategies.

A particularly compelling example highlighted how necessity can drive innovation when leadership embraces flexibility.

"A few years ago, our schoolhouse lost connectivity, and with everything stored on SharePoint, we lost all the slides, all the manuals—everything. We tried to stall for a few days but had to keep going to stay on schedule. We were forced to use the techniques we are being taught here and loved it. The students loved it, the instructors loved it—life was awesome. So when we got connectivity back, we just kept going. This is something our OIC tells everyone when they check in, and it's stressed from day one how great this stuff is." — Field Notes

In some cases, schoolhouses actively encouraged innovation by recognizing and rewarding instructors who incorporated modern teaching methodologies.

"We have awards at our schoolhouse whenever we update a Master File or come up with new ways to integrate the techniques taught here." — Field Notes

However, not all environments were equally supportive. A recurring theme in discussions and post-course interviews was resistance from senior personnel who adhered to an "Old Corps" mindset. These individuals, often in leadership roles, dismissed new approaches, reinforcing outdated methods and discouraging innovation.

"If you need an award to feel good about yourself and do your job, this isn't the job for you." — Field Notes

For some, resistance from senior leadership created an insurmountable barrier to change, as these individuals held the authority to approve or reject instructional modifications.

"The Master Guns at our unit laughs when we come back from this course and just tells us he's been doing this longer than we've been in and to just get on board. Our OIC doesn't care and takes his (Master Guns') side anytime we bring up changing anything." — Field Notes

Additionally, some schoolhouses were influenced by civilian personnel who dictated instructional content based on personal biases rather than operational needs.

"Our schoolhouse has this civilian who decides what to teach based on what he remembers people struggling with, rather than consulting the units about what they actually need from students. He's so out of touch—he just imposes orders and a curriculum focused on his pet peeves, making life miserable for the units and instructors. In turn, the students arrive at the unit unprepared." — Field Notes

This contrast between supportive and resistant leadership underscores the profound impact supervisors have on training environments. When leaders embrace and advocate for modern instructional methods, they foster a culture of continuous improvement. Conversely, when they dismiss innovation, they stifle progress and maintain ineffective training paradigms.

Conclusion

The findings presented in Chapter Four offer a comprehensive examination of the experiences and perceptions of military instructors and faculty participating in the Facilitating Learning Experiences (FLEX) course. Through interviews, observations, and participant reflections, this study identified key themes related to learning transfer, instructional engagement, and the broader organizational influences that shape the implementation of modern teaching methodologies.

A major takeaway from the research was the significant role that motivation, peer influence, and leadership support play in shaping instructor engagement and knowledge transfer. While some trainees initially resisted adopting 21st-century learning techniques, many later recognized their value, particularly when reinforced through peer

encouragement and institutional backing. Conversely, policy restrictions, contractual obligations, and entrenched instructional norms created barriers to change, limiting the adoption of effective teaching strategies.

Another key theme was the impact of course design on trainee engagement. While many students initially found the FLEX course overwhelming, intentional structuring—starting with intensive content exposure followed by hands-on application—proved to be an effective model for learning transfer. Additionally, students who worked with their own course materials demonstrated higher levels of engagement and confidence compared to those using generic training content.

Chapter Five: Discussions and Recommendations

This study examined the transfer of learning among Marine instructors enrolled in the Facilitating Learning Experiences (FLEX) course at the Marine Corps Center for Learning and Faculty Development (MCCLFD). A total of ten semi-structured interviews were conducted, involving four faculty members and six students. Of the six students, only four participated in follow-up interviews. These interviews provided valuable insights into participants' lived experiences both during the course and after their return to their respective Formal Learning Centers. The research identified three major themes that influence learning transfer. This chapter interprets the findings from Chapter Four through the lens of existing literature, including Baldwin and Ford's (1988) transfer of training model, Illeris's (2009) three dimensions of learning, and Boone et al. (1977) social learning theory. Based on these insights, recommendations are provided to improve faculty development programs, address policy barriers, and foster a more supportive learning transfer environment within the Marine Corps.

Participants offered detailed and personal reflections on their experiences, consistently aligning with the Baldwin and Ford model, which emphasizes the influence of course design, trainee motivation, and the work environment on the transfer of learning. Notably, stakeholders provided particularly valuable insights regarding the work environment's role in facilitating or hindering knowledge transfer. These interviews, combined with an extensive literature review, offer a comprehensive understanding of the factors that shape effective learning transfer. The findings contribute to a broader discourse on training and development, providing recommendations for policy enhancements and procedural improvements.

Statement of Problem

The effective transfer of training holds substantial significance for both individual professional growth and organizational effectiveness. This is particularly relevant across diverse sectors, including civilian institutions and, notably, the military, which represents one of the largest consumers of adult education. Given the extensive application of training in military contexts, ensuring successful knowledge transfer is critical. Within military education, instructors demonstrate a profound commitment to self-improvement, recognizing that the effective application of their training has direct implications for their safety and the well-being of their fellow service members.

Research Purpose

This case study investigated the transfer of knowledge from training centers to operational implementation within the Marine Corps. Specifically, it examined the extent to which trainees apply the knowledge and instructional techniques acquired at the Marine Corps Center for Learning and Faculty Development (MCCLFD) within various educational institutions across the Marine Corps. The study aimed to identify key facilitators and barriers to learning transfer, thereby informing best practices for faculty development and instructional effectiveness in Military Education.

Research Questions

RQ 1: What are the experiences and perceptions of military school instructors in a faculty development school course?

RQ 2: What are the experiences and perceptions of military school instructors on implementing training from a faculty development school course?

Summary of Key Findings

The study's key findings underscore the complexity of trainee motivation and engagement in faculty development courses. Effective course design fosters meaningful interactions among trainees, even when initial motivation levels are low. Providing opportunities for trainees to engage with course materials enhances motivation and engagement, particularly when they perceive the content as relevant to their professional responsibilities. However, resistance to change and low self-efficacy emerge as significant barriers, highlighting the necessity for targeted support strategies. Peer influence proves to be a powerful motivational factor, reinforcing the importance of collaborative learning environments.

Additionally, institutional policies, including contracting regulations and command directives, significantly shape the training experience. These findings suggest the need for thoughtful policy considerations that align institutional expectations with the practical needs of trainees. Furthermore, supervisors play a crucial role in shaping the work environment, directly impacting trainee motivation and overall training effectiveness. Collectively, these findings emphasize the importance of a holistic approach to training design and implementation, incorporating structural, social, and policy-driven factors to optimize learning transfer.

Interpretation of Findings

Out of the emerging themes, two items stood out as predictors of student learning. The trainee's peers and their influence on the trainee's motivation significantly impacted the trainee's motivation going on the course. The students whose peers were positive about the course appeared to be more receptive to the material from day one. These motivations can change based on the training but are a strong predictor of

their starting motivation. Following the course, the major predictor was the work environment. Through the interviews, the researcher noted that even students with poor motivation and a negative connotation of the course felt pressure once returning to their FLC to utilize and implement the training.

Implications

Theoretical Implications

The findings of this research reinforce and expand upon existing theories concerning the factors that influence learning transfer, particularly the interconnected roles of training design, trainee motivation, and the work environment. Prior research suggests that the successful application of learned skills is not solely an individual cognitive process but a function of social and environmental factors (Baldwin & Ford, 1988; Burke & Hutchins, 2007; Ford et al., 2017). This study provides empirical evidence that the work environment—specifically the roles of supervisors and peers—plays a pivotal role in shaping trainees’ receptiveness to new knowledge and instructional methods. Field notes and interview transcripts revealed that multiple students shared similar experiences regarding the importance of focusing during the course. For example, Student 5 recalled, “A SNCO pulled me aside and told me to focus while here,” while Student 1 noted, “...everyone I talked to told me to pay attention here.” These comments reflect an understanding of the course’s significance, reinforced by peers and senior personnel. Supervisors and peers exert significant influence on trainees’ motivation, either fostering a positive mindset conducive to the application of learned strategies or reinforcing skepticism and resistance (Bonnes & Hochholdinger, 2020; Chuang, 2021).

These findings align with and extend prior research by underscoring the importance of social dynamics in the transfer of learning, particularly within hierarchical and structured environments such as military education. Studies have emphasized that while training design and individual motivation are critical, the broader organizational culture and social interactions significantly determine whether trainees will successfully implement new methodologies (Blume et al., 2009; Salas et al., 2012). This insight suggests that learning transfer is embedded within social structures, institutional norms, and leadership behaviors (Holton, 1996; Illeris, 2009). Future research should explore these social dimensions further, particularly in other structured environments where hierarchical dynamics and command structures shape learning behaviors (Hampson & Taber, 2020; Schmidt, 2014).

Practical Implications

The study underscores the essential role that supervisors play in facilitating or impeding the application of newly acquired learning strategies. In military education settings, supervisors—ranging from immediate leaders to Formal Learning Center (FLC) commanders—wield considerable influence over the implementation process (Ford et al., 2017; Huang et al., 2016). Their attitudes and actions directly shape trainees' experiences, particularly during the critical transition from training environments to operational contexts (Biech, 2017; Salas et al., 2012).

Supervisors in military settings have unique mechanisms at their disposal to encourage change and foster an environment supportive of innovation. By actively recognizing and rewarding individuals who embrace and champion new instructional approaches, they can cultivate a culture that values continuous improvement (Blume et

al., 2009; Schmidt, 2014). Formal accolades, such as commendations, professional development opportunities, or public recognition, can serve as motivational tools, reinforcing the importance of innovative teaching strategies (Burke & Hutchins, 2007; Chuang, 2021). These incentives not only benefit individual trainees but also signal the organization's broader commitment to advancing educational practices (Biech, 2017).

Additionally, supervisors play a crucial role in shaping peer dynamics within learning environments. Encouraging collaboration and discouraging resistance to change can create a more cohesive and supportive training culture (Bonnes & Hochholding, 2020). Social reinforcement through peer networks can enhance motivation and reduce reluctance associated with adopting unfamiliar instructional techniques (Boone et al., 1977; Ford et al., 2017). Given the hierarchical nature of military institutions, supervisory encouragement can be particularly effective in normalizing innovative pedagogical approaches (Hampson & Taber, 2020).

Policy Implications

The research findings suggest several actionable policy measures that can enhance the effectiveness of faculty development programs and facilitate the transfer of learning in structured environments:

Incentives for Adoption Change. To encourage the adoption of new instructional strategies, supervisors should leverage structured reward systems that formally recognize and incentivize innovation. For instance, awards for excellence in implementing 21st-century learning methods could serve as a motivational tool for educators and reinforce a culture of instructional improvement (Hampson & Taber, 2020; Salas et al., 2012). Additionally, integrating learning transfer metrics into professional

evaluations could further institutionalize these practices, ensuring that training application is a sustained priority rather than a transient effort (Blume et al., 2009; Schmidt, 2014).

Standard Operating Procedures (SOPs) for Instructional Strategies. Formal policies mandating the use of evidence-based teaching strategies can standardize expectations and reduce ambiguity in instructional implementation. SOPs that explicitly define the application of methodologies such as active learning, learner-centered instruction, and technology-enhanced teaching can provide clear guidelines for instructors (Bonnes & Hochholdingner, 2020; Chuang, 2021). These policies would ensure consistency across educational institutions while also offering a structured framework for faculty to reference when integrating new pedagogical approaches (Biech, 2017; Schmidt, 2014).

Leadership Accountability for Learning Transfer. Supervisors should be held accountable for fostering an environment conducive to learning transfer. This accountability can be implemented through periodic assessments of how effectively new strategies are being integrated within instructional settings (Baldwin & Ford, 1988; Burke & Hutchins, 2007). Leadership training programs focused on change management, faculty mentorship, and innovation adoption should be incorporated into professional development initiatives for educational leaders (Blume et al., 2009; Ford et al., 2017). By equipping supervisors with the necessary skills to support learning transfer, institutions can create a sustainable culture of instructional excellence (Salas et al., 2012).

Discussion Conclusion

These implications highlight the interconnected nature of social influence, organizational culture, and formal policy in shaping the success of faculty development initiatives. By integrating structured incentives, clear instructional guidelines, and leadership accountability measures, military and other structured institutions can enhance the effectiveness of learning transfer (Burke & Hutchins, 2007; Schmidt, 2014).

A comprehensive approach that addresses both individual and systemic factors is essential for fostering an educational environment where new strategies are embraced and sustained over time (Illeris, 2009; Merriam & Bierema, 2014). By implementing best practices in faculty development, addressing policy barriers, and ensuring strong leadership support, the Marine Corps can continue to enhance the effectiveness of military education while fostering a culture of lifelong learning and instructional innovation.

Limitations

Single Course

One of the primary limitations of this study was its focus on a single course, which constrains the generalizability of its findings. Due to time constraints, data were collected from only one iteration of the Faculty Learning Experience (FLEX) course at a single Marine Corps Formal Learning Center (FLC). As a result, the study did not capture potential variations in instructional delivery, student engagement, or institutional culture that may exist across different FLCs, military branches, or successive iterations of the course (Yin, 2018). The experiences and perceptions documented in this research may therefore be context-specific and not fully representative of broader military instructor training programs.

Future research should address this limitation by incorporating data from multiple courses over an extended period. A longitudinal approach could provide deeper insights into how learning transfer evolves over time and whether the effectiveness of training programs fluctuates based on different cohorts, facilitators, or institutional settings (Blume et al., 2009). Additionally, expanding the study to include similar courses across other branches of the military would enhance the external validity of the findings, offering a more comprehensive understanding of faculty development programs in diverse operational contexts (Baldwin & Ford, 1988).

Experience Level of Participants

Another significant limitation pertains to the experience level of the students enrolled in the study. The majority of participants were relatively new to their assignments at their respective FLCs, with approximately 80% having been in their roles for only three days to eight weeks before attending the FLEX course. Many of these students had not yet completed their onboarding processes or conducted in-depth curriculum reviews, which limited their ability to fully engage with and apply the course material in meaningful ways (Ford et al., 2017).

Due to their limited instructional experience, these participants may have lacked the practical context necessary to critically assess the relevance and applicability of the FLEX course content. As a result, their responses during interviews may not reflect a fully developed understanding of how the training aligns with real-world instructional demands. More experienced instructors, who have had time to implement and reflect on course concepts, may offer richer, more nuanced insights into the effectiveness of faculty development initiatives. Future research should consider incorporating perspectives from

a wider range of participants, including those with extensive teaching experience, to achieve a more balanced and insightful evaluation of the training program (Burke & Hutchins, 2007).

Environmental and Institutional Factors

The unique institutional and environmental context of the study presents another limitation. The research was conducted at a single Marine Corps FLC, where leadership styles, available resources, and institutional culture may have significantly influenced both course delivery and student experiences (Schmidt, 2014). These factors could have impacted participants' perceptions of the FLEX course, as variations in command emphasis on training, administrative support, and peer collaboration could either enhance or inhibit the effectiveness of the learning transfer process.

Because institutional environments differ across FLCs and military training centers, findings from this study may not be fully applicable to other settings. Conducting similar research in varied institutional environments would help determine the extent to which environmental factors affect the success of faculty development programs. Comparative analyses between multiple FLCs, or between military and civilian instructional settings, could provide valuable insights into best practices for fostering effective learning transfer across different organizational cultures (Salas et al., 2012).

Potential for Self-Selection Bias

The study's reliance on volunteer participants introduces the possibility of self-selection bias, which may have influenced the findings. Individuals who chose to participate may have had particular motivations, experiences, or perspectives that set them apart from those who declined involvement. For example, participants may have

been more engaged with the course material, more receptive to instructional innovation, or more interested in the research topic than their non-participating peers (Biech, 2017). As a result, the data collected may disproportionately reflect the views of highly motivated or invested individuals, rather than a representative cross-section of all trainees.

To mitigate this limitation in future research, recruitment strategies could be adjusted to encourage broader participation, such as incorporating mandatory feedback mechanisms or randomly selecting participants from different cohorts. Additionally, integrating quantitative assessments, such as pre- and post-course evaluations, could complement qualitative findings and help identify whether self-selection significantly influences study outcomes (Taylor, 2022).

Limitations in Generalizability

Given the study's narrow focus on a single course within one Marine Corps FLC, the findings are not easily generalizable to all military instructor training programs. Variations in course structure, teaching methodologies, and student demographics across different military branches or FLCs within the Marine Corps could yield different learning experiences and outcomes (Blume et al., 2010). Differences in institutional priorities, resource availability, and leadership approaches may further contribute to discrepancies in how training programs are perceived and implemented.

As a result, caution should be exercised when applying the results of this study to other military education settings. Future research should expand the scope of investigation by including multiple training environments, diverse instructor populations, and comparative analyses across different branches of the armed forces. Such an

approach would provide a more robust understanding of the factors influencing learning transfer in military faculty development programs and enhance the applicability of findings to a broader range of instructional contexts (Illeris, 2009).

Despite these limitations, this study provided valuable insights into the challenges and opportunities associated with learning transfer in military faculty development. While the findings are contextually bound to a single course and participant group, they highlight key factors—such as institutional culture, supervisory influence, and trainee experience level—that merit further exploration in future research. Expanding the scope of inquiry through longitudinal studies, comparative analyses, and broader participant sampling will enhance the validity and applicability of research on faculty development in military education.

Recommendations for Future Research

This study also provided valuable insights into how the Military might utilize faculty development programs to facilitate instructional change within a broader population. The findings indicate that traditional models of learning transfer can be effectively applied even within highly specialized and structured environments such as military education. However, a notable gap in the research is the lack of concrete data demonstrating the long-term implementation of acquired knowledge. While qualitative evidence from students and faculty suggests that learning transfer occurs, there is limited empirical data to verify the extent and sustainability of this transfer.

Future research should focus on evaluating the post-course impact of faculty development programs on students at their respective Formal Learning Centers (FLCs). A combination of quantitative and third-party qualitative data collection methods would

provide a more comprehensive assessment of learning transfer. One potential approach is to conduct follow-up interviews with supervisors to obtain qualitative insights into instructional changes observed after the course. Additionally, incorporating an analysis of performance evaluations, such as fitness reports completed by supervisors, could provide an objective measure of knowledge implementation and instructional effectiveness.

Another important consideration for future research is the duration of the study. In this research, students provided feedback approximately six weeks after returning to their FLCs. However, this period was found to be insufficient for many participants to fully articulate their instructional impact, as they were still undergoing onboarding and familiarization with their new roles. Extending the study over a longer timeframe would allow for a more accurate assessment of learning transfer, capturing both immediate and long-term effects on instructional practices.

Furthermore, future studies should explore learning transfer across diverse instructional environments, including different military branches and training institutions, to identify broader trends and contextual factors influencing faculty development outcomes. Examining long-term instructional growth and its relationship to operational readiness would contribute to a more comprehensive understanding of the role of faculty development in military education. By addressing these gaps, future research can enhance the effectiveness of faculty training programs and their contribution to mission success.

Conclusion

This study contributes to the understanding of learning transfer in military faculty development by examining how instructional training is applied in operational settings. The findings reinforce the applicability of traditional learning transfer models,

demonstrating that course design, trainee motivation, and the work environment play integral roles in shaping instructional effectiveness. By exploring the perspectives of faculty and students, this research highlights both the opportunities and challenges associated with implementing faculty development programs in highly structured environments. Moreover, it underscores the critical role of supervisors in facilitating or impeding the adoption of new instructional strategies, ultimately shaping the success of learning transfer within Formal Learning Centers (FLCs).

The significance of this study lies in its emphasis on the supervisory role in fostering an environment conducive to instructional change. Supervisors are not only responsible for supporting faculty development initiatives but also serve as key drivers of institutional transformation. Their ability to encourage innovation, recognize achievements, and hold instructors accountable directly impacts the sustainability of newly acquired teaching methodologies. As such, policies and leadership strategies must be intentionally designed to enhance the effectiveness of learning transfer, ensuring that faculty development programs contribute meaningfully to both individual professional growth and broader organizational goals.

In conclusion, this research serves as a foundation for further exploration of faculty development in military education, particularly regarding the long-term implementation of instructional strategies. While the study provides valuable insights into the factors influencing learning transfer, it also identifies areas for continued investigation, including the need for quantitative assessments, longitudinal research, and cross-institutional comparisons. By addressing these gaps, future studies can further refine best practices for faculty development and contribute to the ongoing improvement

of military training programs, ultimately enhancing the effectiveness of instruction and operational readiness.

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AUBURN UNIVERSITY INSTITUTIONAL REVIEW BOARD for RESEARCH INVOLVING HUMAN SUBJECTS

PROTOCOL REVIEW FORM

FULL BOARD or EXPEDITED REVIEW

For assistance, contact: **The Office of Research Compliance (ORC)**

Phone: **334-844-5966** E-Mail: IRBAdmin@auburn.edu Web Address: <http://www.auburn.edu/research/vpr/ohs>

Submit completed form and supporting materials as one PDF through the [IRB Submission Page](#)

Handwritten forms are not accepted. Where links are found hold down the control button (Ctrl) then click the link.

1. Proposed Start Date of Study: 6/3/2024 Today's Date: **May 24, 2024**
 Submission Status (Check One): ☐ New ☒ Revisions (to address IRB Review Comments)
 Proposed Review Category (Check One): ☐ Full Board (greater than minimal risk) ☐ Expedited
 If Expedited, Indicate Category(ies) (([Link to Expedited Category Review Sheet](#)) Click or tap to enter category.)

2. Project Title: Assessing the Transfer of Learning: A Qualitative Case Study on the Acceptance of Knowledge from a Military Faculty Development Center

3. Principal Investigator (PI): Brent Teague Degree(s): BA, currently ADED MS program
 Rank/Title: Graduate Student Department/School: Educational Foundations, Leadership, and Technology
 Role/responsibilities in this project: Responsible for the overall project, recruitment of participants, conduct interview, transcribe data, code and analyze data, report data in thesis.
 Preferred Phone Number: 770-304-6132 AU Email: BCT0031@Auburn.edu

 Faculty Advisor Principal Investigator (if applicable): Dr. Leslie Cordie
 Rank/Title: Associate Professor Department/School: **EFLT/COE**
 Role/responsibilities in this project: Supervise and guide principal investigator (graduate student)
 Preferred Phone Number: 334-844-3089 AU Email: lak0007@auburn.edu

 Department Head: Dr. William Murrah Department/School: EFLT
 Preferred Phone Number: 334-844-3806 AU Email: wmm0017@auburn.edu
 Role/responsibilities in this project: Department Head

4. Funding Support: ☒ N/A ☐ Internal External Agency: Click or tap here to enter text. Pending ☐ Received ☐
 For federal funding, list funding agency and grant number (if available): Click or tap here to enter text.

5. a) List any contractors, sub-contractors, and other entities associated with this project: NA
 b) List any other AU IRB approved protocols associated with this study and describe the association: NA
 c) List any other institutions associated with this study and submit a copy of their IRB approval(s): NA

Protocol Packet Checklist

Check all applicable boxes. A completed checklist is required.

- ☒ **Protocol Review Form** (All required signatures included and all sections completed)
 (Examples of appended documents are found on the website: <https://cws.auburn.edu/OVPR/pm/compliance/irb/sampledocs>)
- ☒ **CITI Training Certificates** for key personnel
- ☒ **Consent Form or Information Letter** and any releases (audio, video or photo) that participants will review and/or sign
- ☒ **Appendix A** "Reference List"
- ☒ **Appendix B** if e-mails, flyers, advertisements, social media posts, generalized announcements or scripts, etc., will be used to recruit participants.

The Auburn University Institutional
 Review Board has approved this
 Document for use from
05/21/2024 to -----
 Protocol # 24-848 EP 2405

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- ☒ **Appendix C** if data collection sheets, surveys, tests, other recording instruments, interview scripts, etc. will be used for data collection. Attach documents in the order they are listed in item 13c. **Continued on Page 2**
- ☐ **Appendix D** if they study will use a debriefing form or will include emergency plans/ procedures and medical referral lists. (A referral list may be attached to the consent document.)
- ☒ **Appendix E** if research is being conducted at sites other than Auburn University or in cooperation with other entities. A **permission letter** from the site/ program director must be included indicating their cooperation or involvement in the project. NOTE: If the proposed research is a multi-site project, involving investigators or participants at other academic institutions, hospitals or private research organizations, a letter of **IRB approval** from each entity is required prior to initiating the project.
- ☐ **Appendix F** Written evidence of approval by the host country, local IRB or institutions if research is conducted outside the United States

6. General Research Project Characteristics

6A. Research Methodology											
Check all descriptions that best apply to the research methodology.											
Data Source(s): ☒ New Data ☐ Existing Data	Will recorded data directly or indirectly identify participants? ☒ Yes ☐ No										
Data collection will involve the use of: <table style="width: 100%; border: none;"> <tr> <td style="vertical-align: top; width: 50%;"> ☐ Educational Tests (cognitive diagnostic, aptitude, etc.) ☒ Interview ☒ Observation ☐ Locations or Tracking Measures ☐ Physical / Physiological Measures or Specimens ☒ Surveys / Questionnaires ☒ Other: Internal documents from USMC </td> <td style="vertical-align: top; width: 50%;"> ☒ Internet / Electronic ☒ Audio ☐ Video ☐ Photos ☐ Digital Images ☐ Private records or files </td> </tr> </table>		☐ Educational Tests (cognitive diagnostic, aptitude, etc.) ☒ Interview ☒ Observation ☐ Locations or Tracking Measures ☐ Physical / Physiological Measures or Specimens ☒ Surveys / Questionnaires ☒ Other: Internal documents from USMC	☒ Internet / Electronic ☒ Audio ☐ Video ☐ Photos ☐ Digital Images ☐ Private records or files								
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6B. Participant Information	6C. Risks to Participants										
Check all descriptors that apply to the TARGET population. (link to definition of target population) ☒ Males ☒ Females ☐ AU students Vulnerable Populations ☐ Pregnant Women/Fetuses ☐ Prisoners ☐ Institutionalized ☐ Children and / or Adolescents (under age 18 in AL; if minor participants, at least 2 adults must be present during all research procedures that include the minors) Persons with: ☐ Economic Disadvantages ☐ Physical Disabilities ☐ Educational Disadvantages ☐ Intellectual Disabilities Will participants be compensated? ☐ Yes ☒ No	Identify all risks participants might encounter in this research. <table style="width: 100%; border: none;"> <tr> <td>☒ Breach of Confidentiality*</td> <td>☒ Coercion</td> </tr> <tr> <td>☐ Deception</td> <td>☐ Physical</td> </tr> <tr> <td>☐ Psychological</td> <td>☐ Social</td> </tr> <tr> <td>☐ None</td> <td></td> </tr> <tr> <td colspan="2">☐ Other (COVID-19, other medical):</td> </tr> </table> Click or tap here to enter text. *Note that if the investigator is using or accessing confidential or identifiable data, reach of confidentiality is always a risk.	☒ Breach of Confidentiality*	☒ Coercion	☐ Deception	☐ Physical	☐ Psychological	☐ Social	☐ None		☐ Other (COVID-19, other medical):	
☒ Breach of Confidentiality*	☒ Coercion										
☐ Deception	☐ Physical										
☐ Psychological	☐ Social										
☐ None											
☐ Other (COVID-19, other medical):											
6D. Corresponding Approval/ Oversight											
- Does the study include participant exposure to radiation? ☐ Yes ☒ No If yes indicate: ☐ DEXA ☐ PQCT ☐ Other - Is IBC Approval required for this study? ☐ Yes ☒ No If yes, BUA # Click or tap here to enter text. Expiration Date Click or tap to enter a date. - Is IACUC Approval required for this study? ☐ Yes ☒ No If yes, PRN # Click or tap here to enter text. Expiration Date Click or tap to enter a date.											

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- Does this study involve the Auburn University MRI Center?
☐ Yes ☒ No

Which MRI(s) will be used for this project? (Check all that apply)

☐ 3T ☐ 7T

Does any portion of this project require review by the MRI Safety Advisory Council?

☐ Yes ☒ No

Continued on Page 3

Signature of one MRI Center Representative: _____

Required for all projects involving the AU MRI Center

Appropriate MRI Center Representatives:

Dr. Thomas S. Denney, Director AU MRI Center

Dr. Ron Beyers, MR Safety Officer

7. Project Assurances

7A. Principal Investigator's Assurances

1. I certify that all information provided in this application is complete and correct.
2. I understand that, as Principal Investigator, I have ultimate responsibility for the conduct of this study, the ethical performance this project, the protection of the rights and welfare of human subjects, and strict adherence to any stipulations imposed by the Auburn University IRB.
3. I certify that all individuals involved with the conduct of this project are qualified to carry out their specified roles and responsibilities and are in compliance with Auburn University policies regarding the collection and analysis of the research data.
4. I agree to comply with all Auburn policies and procedures, as well as with all applicable federal, state, and local laws regarding the protection of human subjects, including, but not limited to the following:
 - a. Conducting the project by qualified personnel according to the approved protocol
 - b. Implementing no changes in the approved protocol or consent form without prior approval from the Office of Research Compliance
 - c. Obtaining the legally effective informed consent from each participant or their legally responsible representative prior to their participation in this project using only the currently approved, stamped consent form
 - d. Promptly reporting significant adverse events and / or effects to the Office of Research Compliance in writing within 5 working days of the occurrence.
5. If I will be unavailable to direct this research personally, I will arrange for a co-investigator to assume direct responsibility in my absence. This person has not been named as co-investigator in this application, or I will advise ORC, by letter, in advance of such arrangements.
6. I agree to conduct this study only during the period approved by the Auburn University IRB.
7. I will prepare and submit a renewal request and supply all supporting documents to the Office of Research Compliance before the approval period has expired if it is necessary to continue the research project beyond the time period approved by the Auburn University IRB.
8. I will prepare and submit a final report upon completion of this research project.

My signature indicates I have read, understand and agree to conduct this research project in accordance with the assurances listed above.

Brent Teague
Principal Investigator Name

Brent Teague
Principal Investigator Signature

05242024
Date

7B. Faculty Advisor / Sponsor's Assurances

1. I have read the protocol submitted for this project for content, clarity, and methodology.
2. By my signature as faculty advisor / sponsor on this research application, I certify that the student or guest investigator is knowledgeable about the regulations and policies governing research with human subjects and has sufficient training and experience to conduct this particular study in accord with the approved protocol.
3. I agree to meet with the investigator on a regular basis to monitor study progress. Should problems arise during the course of the study, I agree to be available, personally, to supervise the investigator in solving them.
4. I assure that the investigator will promptly report significant incidents and / or adverse events and / or effects to the ORC in writing within 5 working days of the occurrence.
5. If I will be unavailable, I will arrange for an alternate faculty sponsor to assume responsibility during my absence, and I

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will advise the ORC by letter of such arrangements. If the investigator is unable to fulfill requirements for submission of renewals, modifications or the final report, I will assume that responsibility.

Leslie A. Cordie
Faculty Advisor / Sponsor Name

Leslie Cordie
Faculty Advisor Signature

05/24/2024
Date

Continued on Page 4

7C. Department Head's Assurance

By my signature as department head, I certify that I will cooperate with the administration in the application and enforcement of all Auburn University policies and procedures, as well as all applicable federal, state, and local laws regarding the protection and ethical treatment of human participants by researchers in my department

William Murrah III
Department Head Name

William Murrah III
Department Head Signature

05/24/2024
Date

8. Project Overview:

8A. A summary of relevant research findings leading to this research proposal:

(Cite source; include a "Reference List" as **Appendix A.**)

Warfighting represents a multifaceted, demanding, and dynamic human endeavor. Acknowledging the profound impact of learning and knowledge transfer on warfighting capabilities, the Marine Corps and the military at large must prioritize these aspects (U.S. Marine Corps & Berger, 2020). This ethos of constant learning and knowledge dissemination is intrinsic to the military's identity and to the individuals who serve, assuming roles as both learners and educators within the service (Van Baarle et al., 2015). Notably, the scale of the military, in contrast to civilian higher education institutions and corporate training entities, presents distinct challenges (Schmidt, 2014).

Beginning in 2015 for the Army and 2023 for the Marine Corps, a concerted effort emerged to enhance adult education and elevate the professionalism of the instructor corps (Department of the Army, 2017; JCS Vision & Guidance for Professional Military Education, 2023). These initiatives aim to transform instructors from mere subject matter experts into expert educators who possess not only deep understanding of the material but also insight into the learning process (Schmidt, 2014).

In alignment with this shift, there has been a renewed emphasis on educational centers that play a pivotal role in shaping the broader corps through comprehensive training programs (JCS Vision & Guidance for Professional Military Education, 2023). Assessing the effectiveness of such training involves evaluating students' knowledge acquisition through assessments and surveys (Khasawneh et al., 2024). Taking a holistic view, learning encompasses more than mere acquisition; it involves the acceptance of knowledge (Taylor, 2022). This acceptance begins with the acquisition and retention of knowledge, influenced by factors such as message salience, personal interest, and cognitive awareness (Biech, 2017). Moreover, the transfer of learning is not an isolated event but a psychological process that unfolds over time (Biech, 2017; Taylor, 2022). Ensuring effective transfer requires ongoing follow-up, commencing from the conclusion of training sessions and extending into the application phase (Biech, 2017; Taylor, 2022). Consequently, attention to course and curriculum development, training and post-training activities are all equally crucial to fostering the acceptance and transfer of learning in these new initiatives (Biech, 2017).

8B. A brief summary/abstract of the study methodology, including design, population, and variables of interest.

(350 word maximum, in language understandable to someone who is not familiar with your area of study. Note this summary/abstract can be used to prepare the concise summary in the consent document.):

This mixed-methods case study investigates training transfer among Military Instructors from a constructivist perspective. The study focuses on instructors attending the Marine Corps Faculty Development school, examining their actual acceptance of training versus the acquisition of knowledge. The research methodology involves conducting interviews with trainees immediately near the end of course training and again six weeks later to understand how they understand knowledge acquisition, perceived acceptance of the training, and actual integration of the training and materials. Qualitative data will be gathered through interviews with the students to gain insights into the acceptance of training. In addition, faculty at the site, including the curriculum developer, Officer in charge (OIC), and several lead faculty instructors will be interviewed to gain an understanding of the training framework and training documents. Quantitative data will be gathered through the gathering of the end of course critiques to support triangulation of data. In this case, the

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population of interest is Military Instructors, specifically those attending the Marine Corps Center for Learning and Faculty Development (MCCLFD). The choice of a case study design allows for a detailed exploration of how these instructors experience and integrate training into their professional roles. The population being studied, Military Instructors, represents a specialized group with unique training needs and challenges. By focusing on this population, the study aims to uncover nuances in how training is perceived, accepted, and applied within the military training context. The main variables of interest in this study are: 1) Acceptance of Training: This variable refers to how Military Instructors perceive and embrace the training they receive. Factors influencing acceptance may include relevance to their roles, perceived effectiveness, and alignment with existing knowledge and practices; 2) Acquisition of Knowledge: This variable pertains to the actual learning and knowledge acquisition process during training. It encompasses the content, skills, and concepts that instructors are expected to gain from the training program; and 3) Utilization of Training Materials: This variable focuses on how instructors utilize the training materials provided to them. It includes aspects such as application of learned skills, integration of new knowledge into teaching practices, and adaptation of training content to suit specific instructional contexts. By exploring these variables through semi-structured interviews (see Appendix C) with students and faculty (during and after training), observation during the school sessions, and review of internal curriculum materials and other documents, the study seeks to gain a comprehensive understanding of training transfer among Military Instructors and the role of constructivist principles in this process. Using multiple sources of data concerning the process of learning transfer will support triangulation of data that is needed to establish credibility in this case study (Merriam, 1998; Yin, 2018).

9. Purpose

9A. State the purpose of the study and all research questions or aims. (Include a sentence that begins, “The purpose of this study is...”)

The purpose of this case study is to examine the transfer of knowledge from training centers to the operational implementation by personnel using the training. Specifically, the study focuses on investigating the information and techniques disseminated at the Marine Corps Center for Learning and Faculty Development (MCCLFD) and their subsequent application within the various schools across the Marine Corps by trainees. RQ's: (1) What are the experiences and perceptions of military school instructors in a faculty development school course? (1) What are the experiences and perceptions of military school instructors on implementing training from a faculty development school course?

9B. Describe how results of this study will be used? (e.g., presentation? publication? thesis? dissertation?)

The results of this study will be used in the PI's thesis and may be shared or presented in publications or presentations.

10. Key Personnel. Describe responsibilities as specifically as possible. Include information on research training or certifications related to this project. **To determine key personnel see decision tree at <https://cws.auburn.edu/OVPR/pm/compliance/irb/training>. Submit a copy of CITI training documentation for all key personnel.** (For additional personnel, add lines as needed).

To determine Auburn University HIPAA – covered entities click link to [HIPAA Policy](#).

If any key personnel have a formal association with institutions/entities involved in the study (for example is an employee or supervisor at the site research will occur), describe that affiliation. For all non-AU affiliated key personnel, submit a copy of their IRB approval.

Principal Investigator: Brent Teague
Email Address: BCT0031@auburn.edu
ADED MS

Rank/Title: Graduate Student
Degree(s): BA, current graduate student

Dept / Affiliation: Educational Foundations, Leadership, and Technology **HIPAA Covered Entity?** Yes ☐ No ☒

Roles / Responsibilities: Researcher: Recruitment, interviewing, transcription, analysis, participant consent, and reporting of findings.

- AU affiliated? ☒ Yes ☐ No If no, name of home institution: [Click or tap here to enter text.](#)

- Plan for IRB approval for non-AU affiliated personnel? [Click or tap here to enter text.](#)

- Do you have any known competing financial interests, personal relationships, or other interests that could have influence or appear to have influence on the work conducted in this project? ☐ Yes ☒ No

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- If yes, briefly describe the potential or real conflict of interest: [Click or tap here to enter text.](#)
 - Completed required CITI training? ☒ Yes ☐ No If NO, complete the appropriate [CITI basic course](#) and update the revised Exempt Application form.
 - If YES, choose course(s) the researcher has completed: Human Sciences Basic Course 3/26/2027
[Choose a course](#) [Expiration Date](#)
- CITI RCR Course 4/15/2027 (attached to this document)
 Internet 4/15/2027

Individual: Leslie Cordie

Rank/Title: Associate Professor

Email Address: lak0007@auburn.edu

Degree(s): PhD, MBA, BSN

Dept. / Affiliation: Educational Foundations, Leadership, and Technology **HIPAA Covered Entity?** Yes ☐ No ☒

Roles / Responsibilities: Thesis Chair

- AU affiliated? ☒ Yes ☐ No If no, name of home institution: [Click or tap here to enter text.](#)
- Plan for IRB approval for non-AU affiliated personnel? [Click or tap here to enter text.](#)
- Do you have any known competing financial interests, personal relationships, or other interests that could have influence or appear to have influence on the work conducted in this project? ☐ Yes ☒ No
- If yes, briefly describe the potential or real conflict of interest: [Click or tap here to enter text.](#)
- Completed required CITI training? ☒ Yes ☐ No If NO, complete the appropriate [CITI basic course](#) and update the revised Exempt Application form.
- If YES, choose course(s) the researcher has completed: Human Sciences Basic Course 11/15/2026
[Choose a course](#) [Expiration Date](#)

CITI RCR 8/29/25 (attached to this document)
 Internet 11/15/2026

Individual: [Click or tap here to enter text.](#)

Rank/Title: [Choose Rank/Title](#)

Email Address: [Click or tap here to enter text.](#)

Degree(s): [Click or tap here to enter text.](#)

Dept. / Affiliation: [Choose Department/School](#)

HIPAA Covered Entity? Yes ☐ No ☐

Roles / Responsibilities: [Click or tap here to enter text.](#)

- AU affiliated? ☐ Yes ☐ No If no, name of home institution: [Click or tap here to enter text.](#)
- Plan for IRB approval for non-AU affiliated personnel? [Click or tap here to enter text.](#)
- Do you have any known competing financial interests, personal relationships, or other interests that could have influence or appear to have influence on the work conducted in this project? ☐ Yes ☐ No
- If yes, briefly describe the potential or real conflict of interest: [Click or tap here to enter text.](#)
- Completed required CITI training? ☐ Yes ☐ No If NO, complete the appropriate [CITI basic course](#) and update the revised Exempt Application form.
- If YES, choose course(s) the researcher has completed: [Choose a course](#) [Expiration Date](#)
[Choose a course](#) [Expiration Date](#)

Individual: [Click or tap here to enter text.](#)

Rank/Title: [Choose Rank/Title](#)

Email Address: [Click or tap here to enter text.](#)

Degree(s): [Click or tap here to enter text.](#)

Dept. / Affiliation: [Choose Department/School](#)

HIPAA Covered Entity? Yes ☐ No ☐

Roles / Responsibilities: [Click or tap here to enter text.](#)

- AU affiliated? ☐ Yes ☐ No If no, name of home institution: [Click or tap here to enter text.](#)
- Plan for IRB approval for non-AU affiliated personnel? [Click or tap here to enter text.](#)
- Do you have any known competing financial interests, personal relationships, or other interests that could have influence or appear to have influence on the work conducted in this project? ☐ Yes ☐ No
- If yes, briefly describe the potential or real conflict of interest: [Click or tap here to enter text.](#)
- Completed required CITI training? ☐ Yes ☐ No If NO, complete the appropriate [CITI basic course](#) and update the revised Exempt Application form.

Revised 07/12/2022

- If YES, choose course(s) the researcher has completed: [Choose a course](#) [Expiration Date](#)
[Choose a course](#) [Expiration Date](#)

Individual: [Click or tap here to enter text.](#)

Rank/Title: [Choose Rank/Title](#)

Email Address: [Click or tap here to enter text.](#)

Degree(s): [Click or tap here to enter text.](#)

Dept. / Affiliation: [Choose Department/School](#)

HIPAA Covered Entity? Yes ☐ No ☐

Roles / Responsibilities: [Click or tap here to enter text.](#)

- AU affiliated? ☐ Yes ☐ No If no, name of home institution: [Click or tap here to enter text.](#)
- Plan for IRB approval for non-AU affiliated personnel? [Click or tap here to enter text.](#)
- Do you have any known competing financial interests, personal relationships, or other interests that could have influence or appear to have influence on the work conducted in this project? ☐ Yes ☐ No
- If yes, briefly describe the potential or real conflict of interest: [Click or tap here to enter text.](#)
- Completed required CITI training? ☐ Yes ☐ No If NO, complete the appropriate [CITI basic course](#) and update the revised Exempt Application form.
- If YES, choose course(s) the researcher has completed: [Choose a course](#) [Expiration Date](#)
[Choose a course](#) [Expiration Date](#)

11. Location of research.

11A. List all locations where data collection will occur. If applicable, attach permission letters as Appendix

E. (School systems, organizations, businesses, buildings and room numbers, servers for web surveys, etc.) **Be as specific as possible.** (See sample letters at <https://cws.auburn.edu/OVPR/pm/compliance/irb/sampledocs>)

All observations and initial interviews will occur at the Marine Corps Center for Learning and Faculty Development (MCCLFD) located on Camp Johnson in Jacksonville, North Carolina (see Appendix E for approval). All post course interviews will be conducted via Auburn University Zoom technology which allows for the participant to select the location and time for the interview and thereby increases their comfort and safety in sharing their perceptions.

11B. Will study data be stored within a HIPAA covered facility? Yes ☐ No ☒

If yes, which facility(ies) (To determine AU HIPPA covered entities, go to VII of the [HIPPA Hybrid Entity Policy](#)):
[Click or tap here to enter text.](#)

12. Participants (If minor participants, at least 2 adults must be present during all research procedures that include the minors.)

All participants will be affiliated with the Marine Corps Center for Learning and Faulty Development. (MCCLFD), including trainers and trainees. It is expected that between 5 to 15 participants will participate in the study.

12A. Describe the targeted/ intended participant population for the study. Include the anticipated number of participants and inclusion and exclusion criteria and the procedures to ensure more than 1 adult is present during all research procedures which include the minor.

☐ **Check here if existing data will be used and describe the population from whom data was collected including the number of data files.**

Military Instructors that are attending a course at the Marine Corps Center for Learning and Faulty Development (MCCFLD). Participants will be between pay grade E-6 and E-8 (enlisted). It is expected that there will be approximately 30 participants in the course, and that between 5 to 15 will volunteer to participate in the study. Additionally, faulty, specifically the curriculum developer, Officer in Charge (OIC), and lead instructors will be interviewed.

☐ **Check here if permission to access existing data is required and submit a copy of the agreement to access.**

Revised 07/12/2022

[Click or tap here to enter text.](#)

12B. Describe, step-by-step in lay language all procedures to recruit participants. Include in [Appendix B](#) a copy of all e-mails, flyers, advertisements, recruiting scripts, invitations, etc., that will be used to invite people to participate. (See sample documents at <https://cws.auburn.edu/OVPR/pm/compliance/irb/sampledocs>)

The Officer in Charge (OIC) of the Marine Corps Center for Learning and Faculty Development (MCCLFD) will formally introduce the researcher at the onset of the course, providing an opportunity for the researcher to outline the study's purpose to both faculty and students. As the Center Leader, it is an accepted practice that the OIC makes formal introductions of classroom visitors and other personnel. Participants and faculty will then be invited to engage in interviews at the conclusion of the course by the researcher, who will stress that the research study is not mandatory or required as part of the course. An invitation letter will be provided to all course participants in order to share the information. The researcher will emphasize that he will be available outside of the classroom experience so as to minimize the risk of coercion. In addition, individuals will be allowed to withdraw from the study at any time for any reason. Individuals who volunteer for interviews will be asked to share an email and phone contact for follow-up interviews via Zoom (audio only). To minimize coercion of the researcher in relation to the participants, the researcher will wear civilian cloths during all interactions and observations.

12C. Minimum number of participants required to validate the study?

7 with the combination of at least 2 faculty who are teaching the course and 5 students

Number of participants expected to enroll? 30 students in course at MCCLFD; multiple faculty on staff

Provide the rationale for the number of participants. To obtain a comprehensive understanding of the observed phenomena, a minimum number five participants from diverse backgrounds (demographics including rank, age, gender, etc.) would offer sufficient data to construct an understanding of the case (Merriam, 1998, Yin, 2018). Conversely, engaging thirty participants would represent the upper limit due course enrollment at any one time. Two faculty members will be sufficient to gain an understanding of the curriculum background, course development and teaching philosophy and methods.

Is there a limit to the number of participants that will be included in the study?

☒ **No** ☐ **Yes, the number is** [Click or tap here to enter text.](#)

12D. Describe the process to compensate, amount and method of compensation and/or incentives for participants. [AU Procurement and Business Services \(PBS\) policies](#)
(benefits to participants are NOT compensation)

If participants will not be compensated, check here: ☒

Indicate the amount of compensation per procedure and in total: [Click or tap here to enter text.](#)

Indicate the type of compensation: ☐ Monetary ☐ Incentives

- ☐ Raffle or Drawing incentive (Include the chances of winning.)
- ☐ Extra Credit (State the value)
- ☐ Other

Describe how compensation will be distributed (USPS, email, etc.): [Click or tap here to enter text.](#)

13. Project Design & Methods

13A. Describe, step-by-step, all procedures and methods that will be used to consent participants. If a waiver is being requested, indicate the waiver, and describe how the study meets the criteria for the waiver. If minors will be enrolled describe the process to obtain parental/ legally authorized guardian permission.

☒ **Waiver of Consent (including using existing data)**

☐ **Waiver of Documentation of Consent (use of Information Letter)**

□ Waiver of Parental Permission (for college students 18 years or younger)

At the beginning of the course, I will introduce myself, the study, and all potential risks to the participants. To minimize coercion of the researcher in relation to the participants, the researcher wear civilian cloths during all interactions and observations. Following this introduction, I will allow time throughout the course and outside the classroom for individuals willing to study to meet with me to go through consent more fully where they will receive a copy of the document. If the participant volunteers, I will collect their signed copy and schedule the interview process. Throughout the course I will be made available before and after class as well as during all breaks to answer questions or remove participants if they wish to withdraw. Following the course, I will provide time with an email and phone number for them to contact myself and my faculty advisor if they wish to withdraw or ask questions. The Zoom recordings will be with audio only (the camera / video function will be turned OFF so as to only record voices. Participants will be asked to identify themselves with a pseudonym of their choice prior to the start of the interview. There is no more than minimal risk to participants in the study as participants will not be personally identified nor will this information be shared with their military supervisor or the FLEX course instructors. Initial interviews and follow-on interviews will be transcribed through the Zoom audio recording process. Transcripts will be redacted to remove any potential identifiable participant information that may be introduced by the participant during the interview and to verify verbatim transcription. Any other documents provided from the course will be anonymous (end of course surveys) or training documentation for the course itself (curriculum handouts).

13B. In lay language, understandable by someone not familiar with the area of study, describe the complete research design and methods that will be used to address the purpose. Include a clear description of who, when, where and how data will be collected. Include specific information about participants' time and effort.

A case study approach will be used to provide an opportunity for participants to share their experiences on the utilization and acceptance of the training during and after course completion. Semi-structured or conversational style interviews of participants will be used to provide a structure of the participants' training experiences (Merriam, 1998). Eligible participants will be Military instructors between the pay grade of E-6 and E-8 (E=enlisted) attending the facilitating learning experiences (FLEX) course. Participant recruitment will be conducted during the course and Interviews will be conducted using Auburn Zoom technology allowing participants to choose their location for the interview. Participants will be requested to engage in two interviews (both approximately 1 hour in length = 2 total hours of time), spaced a minimum of six weeks apart to look at both perception and integration of knowledge. Secondly, the faculty will be interviewed once during the course to gain an understanding of the curriculum and course requirements (approximately 1 hour for each faculty interviewed). Permission has been given by MCCLFD to conduct this study (Appendix E). The data collected from participants will be from observation, interviews, and the collection of documents from the school where the case study is being conducted. The interviews will be conducted via Auburn Zoom technology and will collect audio and video data along with providing a transcript of the interview. Observation will be conducted throughout the course to provide the researcher with an understanding of the course material and background for conducting the interviews. The school will provide documents on the curriculum (not student documents) as they see fit to enhance the researchers' understanding and the end of course surveys will be provided to the researcher as well by the school staff.

13C. List all data collection instruments used in this project, in the order they appear in Appendix C.

(e.g., surveys and questionnaires in the format that will be presented to participants, educational tests, data collection sheets, interview questions, audio/video taping methods etc.)

The interview protocol for semi-structured interviews are grouped into domains with potential questions identified. Semi structured interviews are intended to be more conversational thus the questions are a guide and may not be presented uniformly across participants (Merriam, 1998).

13D. Data analysis: Describe how data will be analyzed. If a data collection form (DCF) will be used, submit a copy of the DCF.

Interview data will be transcribed through the recording process and redacted by the PI to remove all identifiable information. Only the participant pseudonym will remain as an identifier for the initial interview and post interview at 6 weeks after completion of the course. Interview data will be read using an open coding method to seek out themes for analysis. The data will also be analyzed for a priori codes identified through the literature review. Data will be sorted into codes for grouping and reporting of findings. Other data used in triangulation will be anonymous post-course surveys by the MCCLFD center and other training material for the course (internal documents).

Revised 07/12/2022

13E. List any drugs, medications, supplements, or imaging agents that participants will ingest/ receive during participation in the study or indicate not applicable (N/A).

N/A

14. Risks & Discomforts: List and describe all the risks participants may encounter in this research including risks from item 6d of this form, in this research. If deception will be part of the study, provide the rationale for the deception, describe the debriefing process, and attach a copy of the debriefing form that will be used as Appendix D. (Examples of possible risks are in section #6C)

Breach of Confidentiality: A breach of confidentiality would be possible if the interview recordings or post course surveys are accessed by someone outside of the PI and Faculty Advisor. This risk would also require the person accessing the recording to be familiar enough with the participants to be able to recognize the participant's voice. The end of course surveys are anonymous. The participants will not be asked to discuss potentially sensitive information in the interview process. Participation in this research should not cause any discomfort beyond normal conversation concerning advising process and the utilization of technology.

Coercion: Participants will be introduced to the researcher by the school Officer in Charge (OIC), a high-ranking officer, which is the normal protocol. The researcher is an officer, while the participants are enlisted personnel. Thus, participants may feel coerced into participating in the study.

15. Precautions / Minimization of Risks

15A. Identify and describe all precautions that will be taken to eliminate or reduce risks listed in items 6.c. and 14. If participants can be classified as a "vulnerable" population, describe additional safeguards that will be used to assure the ethical treatment of vulnerable individuals. If applicable, submit a copy of any emergency plans/procedures and medical referral lists in Appendix D. (Sample documents can be found online at <https://cws.auburn.edu/OVPR/pm/compliance/irb/sampledocs> precautions)

The audio recordings and pseudonym list will be maintained in separate password-protected Auburn Box folders shared between the PI and Faculty Advisor only and not with the USMC or OIC. The participants will be in the location of their choice for the secondary Zoom interview, so they will feel comfortable and safe in sharing information. Upon completion of the thesis and approval by the Graduate School, the audio recordings and pseudonym list will be destroyed. The transcriptions, identified only by pseudonym, will be maintained but the PI for potential further analysis and publication. To mitigate the risk of coercion the OIC and researcher will emphasize the voluntary nature of the study and conduct all interviews in civilian attire as this is the uniform for the course. In addition, the recordings will be audio only and participants can withdraw from the study at any time.

15B. If the internet, mobile apps, or other electronic means will be used to collect data, describe confidentiality and/or security precautions that will be used to protect (or not collect) identifiable data? Include protections used during collection of data, transfer of data, and storage of data. If participant data may be obtained and/or stored by apps during the study, describe.

All data including the audio recordings and pseudonym list will be maintained in separate password-protected Auburn Box folders shared between the PI and Faculty Advisor. The PI will maintain an electronic reflective journal during the research process that does not identify the participants. This online journal will be a Word document accessible by the PI in a password protected Auburn Box folder. Prior to all interviews via Auburn Zoom technologies the researcher will ensure the following: Participants are reminded to protect their privacy by completing activities in a private space, to ensure conversations are not overheard; Participants are encouraged to disable "cookies" and close device browser; Participants are told how and where Zoom audio recordings are saved. All recordings will be saved in a password protected Auburn Box Folder. The other training materials provided by the school to all participants will not contain any identifiable information or data (syllabi, curriculum, rubrics, etc.) These may be provided electronically to the researcher, or scanned images that will also be uploaded to the protected Auburn Box folder.

15C. Does this research include purchase(s) that involve technology hardware, software or online services?

☐ YES ☒ NO

If YES:

A. Provide the name of the product Click or tap here to enter text.
and the manufacturer of the product Click or tap here to enter text.

Revised 07/12/2022

B. Briefly describe use of the product in the proposed human subject's research.

[Click or tap here to enter text.](#)

C. To ensure compliance with AU's Electronic and Information Technology Accessibility Policy, contact AU IT Vendor Vetting team at vetting@auburn.edu to learn the vendor registration process (prior to completing the purchase).

D. Include a copy of the documentation of the approval from AU Vetting with the revised submission.

15D. Additional Safeguards

Will DEXA, pQCT, or other devices which emit radiation be used? ☐ Yes ☒ No

If yes, the IRB will notify the Auburn Department of Risk Management and Safety, who will contact the Alabama Department of Public Health (ADPH) and secure approval. Research which includes device(s) which emit radiation may NOT be initiated NOR will IRB stamped consent documents be issued until the IRB is notified of ADPH approval.

Will a Certificate of Confidentiality (CoC) issued by NIH be obtained ☐ Yes ☒ No If yes, include CoC language in consent documents and include the documentation of CoC approval. Research which includes a CoC may not be initiated NOR will IRB stamped consent documents be issued until the IRB is notified of CoC approval. [AU Required CoC Language](#)

Is the study a [clinical trial](#)? ☐ Yes ☒ No

If yes, provide the National Clinical Trial (NCT) # [Click or tap here to enter text.](#) and include required clinical trial information in all consent documents. [AU Clinical Trial Information](#)

16. Benefits

16A. List all realistic direct benefits participants can expect by participating in this study. (Compensation is not a benefit) If participants will not directly benefit check here. ☒

There are no direct benefits to the participants for participating in this study.

16B. List realistic benefits for the general population that may be generated from this study.

The knowledge gained from this study will add to the how schools and supervisors can assess or improve learning benefits from training and contribute to the broader field of adult learning.

17. Protection of Data

17A. Data are collected:

☐ Anonymously with no direct or indirect coding, link, or awareness by key personnel of who participated in the study (skip to item E)

☐ Confidentially, but without a link to participant's data to any identifying information (collected as "confidential" but recorded and analyzed "anonymous") (Skip to item E).

☒ Confidentially with collection and protection of linkages to identifiable information.

17B. If data are collected with identifiers and coded or as coded or linked to identifying information, describe the identifiers and how identifiers are linked to participants' data.

Pseudonyms will be used in the research study. Participants will self-select a pseudonym that will be maintained in a password-protected document only accessible by the PI and Faculty Advisor for the interviews only. This will be kept separate from any other identifying information. Other materials will be anonymous, such as the post-course surveys.

17C. Provide the rationale for need to code participants' data or link the data with identifying information.

Revised 07/12/2022

Participants may feel hesitant to be completely forthcoming when discussing relationships with training supervisors or obstacles to success if there's a risk of their comments being traced back to them. It is important to connect initial interviews with 6-week post interviews for compare participant information and support study credibility.

17D. Describe how and where identifying data and/or code lists will be stored. (Building, room number, AU BOX?) **Describe how the location where data is stored will be secured. For electronic data, describe security measures. If applicable, describe where IRB-approved and participant signed consent documents will be kept on campus for 3 years after the study ends.**

All data will be stored in a password-protected Auburn Box folder only accessible by the PI and Faculty Advisor. A separate folder will be built that will maintain the code list to prevent contamination. Signed consent documents will be stored in a locked cabinet in the faculty advisor's office for 3 years after the study ends.

17E. Describe how and where data will be stored (e.g., hard copy, audio/ visual files, electronic data, etc.), and how the location where data is stored is separated from identifying data and will be secured. For electronic data, describe security. Note use of a flash drive or portable hard drive is not appropriate if identifiable data will be stored; rather, identifying participant data must be stored on secured servers.

All files and electronic data will be kept in a password-protected Auburn Box folder only accessible by the PI and Faculty Advisor.

17F. List the names of all who will have access to participants' data? (If a student PI, the faculty advisor must have full access and be able to produce study data in the case of a federal or institutional audit.)

Brent Teague (PI) and Leslie Cordie (Faculty Advisor)

17G. When is the latest date that identifying information or links will be retained and how will that information or links be destroyed? (Check here if only anonymous data will be retained ☒)

The pseudonym list will be deleted upon completion of the thesis (proposed February 2025).

Version Date: 5/24/2024



COLLEGE OF EDUCATION
DEPARTMENT OF EDUCATIONAL FOUNDATIONS,
LEADERSHIP AND TECHNOLOGY

(NOTE: DO NOT AGREE TO PARTICIPATE UNLESS AN IRB APPROVAL STAMP
WITH CURRENT DATES HAS BEEN APPLIED TO THIS DOCUMENT.)

INFORMED CONSENT

for a Research Study entitled

“Assessing the Transfer of Learning: A Qualitative Case Study on the Acceptance of
Knowledge from a Military Faculty Development Center”

General Information	You are being asked to take part in a research study. This research study is voluntary, meaning you do not have to take part in it. The procedures, risks, and benefits are fully described further in this consent form.
Purpose	The purpose of the study is to take research and understand the transfer of learning. Specifically do students take what they learn and apply it in the workplace.
Duration & Visits	The researcher will visit and observe the classes for approximately 7-10 days for the 8-hour training time of the course.
Overview of Procedures	You will be asked to participate in two interviews via zoom that will each last approximately one hour each session (2 hours total time). The zoom recording will be audio only. One interview will take place in person during the course and the other will take place 6 weeks later. Participants will be asked questions about how they learn and their perceptions of the training materials. Participants can withdraw at any time from the study for any reason.
Risks	The risks associated with this research are a breach of confidentiality and coercion.
Benefits	There are no direct benefits to you for participating in this study. The benefit to researchers is the completion of their thesis and possibility of publishing in a professional journal.
Alternatives	The alternative is not to participate in this study.

4036 HALEY CENTER
AUBURN, AL 36849-5221

TELEPHONE:

334-844-4460

FAX:

334-844-3072

You are invited to participate in a research study to explore the effectiveness of training transfer from higher level faculty development centers to working level schoolhouse facilities in a military setting. The study is being conducted by Brent Teague, Principal Investigator under the direction of Dr. Leslie Cordie, Associate Professor/Faculty Advisor in the Auburn University Department of Educational Foundations, Leadership, and Technology. You are invited to participate because you are Military Instructor assigned to the Facilitating Educational Experiences (FLEX) Course at the Marine Corps center for Learning and Faculty Development (MCCLFD).

What will be involved if you participate? If you decide to participate in this research study, you will be asked to participate in a in person interview and a Zoom interview six weeks after completing the course to discuss your perceptions of the training received and how it has affected you and your unit. Your time commitment will be approximately 60 minutes for each interview (120 minutes total time).

Are there any risks or discomforts? The interview will be audio recorded so a transcription can be produced and used for analysis. The recordings will be destroyed upon successful submission of the resulting thesis expected to be completed by March 31, 2025. The risk associated with participating in this study is a low risk of breach of confidentiality. To minimize this risk, we will ask you to choose a pseudonym and we will not use your real name but will only associate your pseudonym with the written transcription of the interview. You may withdraw from the study at any time for any reason. You are NOT required to participate in this study for successful completion of the FLEX course, nor will it affect your military standing.

Are there any benefits to yourself or others? While you may not receive direct benefits, you will be adding to the knowledge and research concerning training transfer. We/I cannot promise you that you will receive any or all of the benefits described.

Will you receive compensation for participating? There is no compensation for participating in this study.

Are there any costs? If you decide to participate, there is no cost to you. Auburn University has not provided for any payment if you are harmed as a result of participating in this study.

If you change your mind about participating, you can withdraw at any time during the study. Your participation is completely voluntary. If you choose to withdraw, your data can be withdrawn if it is identifiable. Your decision about whether or not to participate or to stop participating will not jeopardize your future in this course or you're standing in any way with the Military.

Your privacy will be protected. Any data obtained in connection with this study will remain confidential. We will protect your privacy and the data you provide by using a pseudonym and maintaining the data in a password-protected Auburn University Box folder that is only accessible by Brent Teague and Dr. Leslie Cordie. Information collected through your participation may be used to fulfill an educational requirement, published in a professional journal, and/or presented at a professional meeting.

The Auburn University Institutional Review Board has approved this Document for use from 05/21/2024 to _____ Protocol # 24-848 EP 2405
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If you have questions or would like to participate in this study, contact Brent Teague at BCT0031@auburn.edu or Dr. Leslie Cordie at lak0007@auburn.edu.

If you have questions about your rights as a research participant, you may contact the Auburn University Office of Research Compliance or the Institutional Review Board by phone (334)-844-5966 or email at IRBadmin@auburn.edu or IRBChair@auburn.edu.

HAVING READ THE INFORMATION PROVIDED, YOU MUST DECIDE WHETHER OR NOT YOU WISH TO PARTICIPATE IN THIS RESEARCH STUDY. YOUR SIGNATURE INDICATES YOUR WILLINGNESS TO PARTICIPATE.

Participant's signature Date

Printed Name

Investigator obtaining consent Date

Brent Teague

Printed Name

Co-Investigator Date

Printed Name

The Auburn University Institutional
Review Board has approved this
Document for use from

05/21/2024 to -----

Protocol # 24-848 EP 2405

Appendix C

Interview Protocol

Students

Thank you for being part of this research study. We have discussed the research process, reviewed the information letter, and you have agreed to participate. I want to remind you that you may withdraw from the study at any time without any retribution or consequence. Will you state your pseudonym and confirm you agree to participate?

Demographic Information

1. Please state your rank and MOS.
2. Please state your race/ethnicity and gender.
3. How long have you been in the Marine Corps?
4. How long have you been an instructor?
5. Please describe the school and course that you teach. Is it a MOS producing school?
6. What formal or informal education do you have on training?

Post Course

1. Will you gain a higher or additional billet based off completion of this course?
2. What are the key takeaways from the FLEX course that you feel will most benefit you or your students?
3. Has anything changed in the way about how you feel as an instructor after this course? If so, what has changed and why?
4. How do you feel about what was learned in this course? In what ways do you feel that this course may have improved your abilities (if any) as an instructor?

5. How do you believe these concepts or skills from this course relate to your actual teaching practice?
6. Were you excited about any particular idea or concept from this course? And if so, what might you take back to your unit or use in practice?
7. Are there any other initiatives you plan to embark on once you return to your home unit from this course or materials?
8. How do you plan to sustain and continue using the knowledge or skills acquired from this training in the long term?
9. How do you perceive the support from your colleagues or school administration in applying the training content to your teaching?
10. Do you foresee any roadblocks to your initiatives? If so, please describe
11. Are there areas of teaching that the training program did not discuss or provide that might better prepare for teaching?
12. What recommendations would you offer to improve the training program to enhance its impact on teachers' classroom practices and student outcomes?

6 weeks post course

1. How has the FLEX course helped you now that you have been back at your unit?
2. Can you provide examples of actions or changes you may have taken since returning to your unit from the FLEX course?
3. Please describe how you perceive your impact, if any, on your unit following the FLEX course.
4. Can you discuss any successes or positive outcomes you've experienced as a result of integrating the training content into your teaching practice?

5. Are there any roadblocks to implementing any of the material you learned during the FLEX course?
6. What strategies have you used to overcome any barriers to implementing the training content effectively?
7. How do you plan to sustain and continue using the knowledge or skills acquired from the training in the long term?
8. Are there areas of teaching that the training program did not discuss or provide that might better prepare for teaching?
9. What recommendations would you offer to improve the training program to enhance its impact on teachers' classroom practices and student outcomes?

Faculty

Thank you for being part of this research study. We have discussed the research process and you have agreed to participate. I want to remind you that you may withdraw from the study at any time without any retribution or consequence. Will you state your pseudonym and confirm you agree to participate?

OIC

1. What are the key takeaways you hope to impart to the students coming through the FLEX course that will most benefit them and their home units?
2. Can you discuss how you think this course will benefit the students' home units?
3. What roadblocks do you foresee or have heard of affecting students.
4. What processes do you have in place to ensure acceptance of the course material compared to the acquisition.

Instructors

1. What material taught do you believe is the most important takeaways for your student to improve their units?
2. Can you discuss how you think this course will benefit the students' home units?
3. What roadblocks do you foresee or have heard of affecting students.
4. What processes do you have in place to ensure acceptance of the course material compared to the acquisition.



Completion Date 15-Apr-2024
Expiration Date 15-Apr-2027
Record ID 62282893

This is to certify that:

Brent Teague

Has completed the following CITI Program course:

Not valid for renewal of
certification through CME.

Responsible Conduct of Research

(Curriculum Group)

AU Basic RCR Training for ALL Faculty, Staff, Postdocs, and Students

(Course Learner Group)

1 - RCR

(Stage)

Under requirements set by:

Auburn University

CITI
Collaborative Institutional Training Initiative

101 NE 3rd Avenue, Suite 320
Fort Lauderdale, FL 33301 US
www.citiprogram.org

Generated on 15-Apr-2024. Verify at www.citiprogram.org/verify/?w19d4b545-1509-4483-ade8-250777e0e944-62282893



Completion Date 26-Mar-2024
Expiration Date 26-Mar-2027
Record ID 61967710

This is to certify that:

Brent Teague

Has completed the following CITI Program course:

Not valid for renewal of
certification through CME.

IRB # 2 Social and Behavioral Emphasis - AU Personnel - Basic/Refresher

(Curriculum Group)

IRB # 2 Social and Behavioral Emphasis - AU Personnel

(Course Learner Group)

1 - Basic Course

(Stage)

Under requirements set by:

Auburn University

CITI

Collaborative Institutional Training Initiative

101 NE 3rd Avenue, Suite 320

Fort Lauderdale, FL 33301 US

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Completion Date 15-Apr-2024
Expiration Date 15-Apr-2027
Record ID 62283271

This is to certify that:

Brent Teague

Has completed the following CITI Program course:

Not valid for renewal of
certification through CME.

IRB Additional Modules

(Curriculum Group)

Internet Research - SBE

(Course Learner Group)

1 - Basic Course

(Stage)

Under requirements set by:

Auburn University

CITI

Collaborative Institutional Training Initiative

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Fort Lauderdale, FL 33301 US

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Completion Date 30-Aug-2022
Expiration Date 29-Aug-2025
Record ID 50995581

This is to certify that:

Leslie Cordie

Has completed the following CITI Program course:

Not valid for renewal of
certification through CME.

Responsible Conduct of Research

(Curriculum Group)

AU Basic RCR Training for ALL Faculty, Staff, Postdocs, and Students

(Course Learner Group)

1 - RCR

(Stage)

Under requirements set by:

Auburn University

CITI
Collaborative Institutional Training Initiative

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Fort Lauderdale, FL 33301 US
www.citiprogram.org

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Completion Date 15-Nov-2023
Expiration Date 15-Nov-2026
Record ID 58959715

This is to certify that:

Leslie Cordie

Has completed the following CITI Program course:

Not valid for renewal of
certification through CME.

IRB Additional Modules

(Curriculum Group)

Social, Behavioral and Education Sciences

(Course Learner Group)

1 - Basic Course

(Stage)

Under requirements set by:

Auburn University

CITI

Collaborative Institutional Training Initiative

101 NE 3rd Avenue, Suite 320

Fort Lauderdale, FL 33301 US

www.citiprogram.org

Generated on 20-Mar-2024. Verify at www.citiprogram.org/verify/?we95f1ca5-270e-415a-b469-1a0498e98d57-58959715



Completion Date 15-Nov-2023
Expiration Date 15-Nov-2026
Record ID 58959716

This is to certify that:

Leslie Cordie

Has completed the following CITI Program course:

Not valid for renewal of
certification through CME.

IRB Additional Modules

(Curriculum Group)

Internet Research - SBE

(Course Learner Group)

1 - Basic Course

(Stage)

Under requirements set by:

Auburn University

CITI

Collaborative Institutional Training Initiative

101 NE 3rd Avenue, Suite 320

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UNITED STATES MARINE CORPS
MARINE CORPS CENTER FOR LEARNING AND FACULTY DEVELOPMENT-EAST DETACHMENT
TRAINING COMMAND
PSC BOX 20041
CAMP LEJEUNE, NORTH CAROLINA 28542-0041

IN REPLY REFER TO:
1300
MCCLFD
21 May 24

From: Maj M. Joel Wagaman, Officer in Charge, Marine Corps Center for Learning and Faculty Development, East Detachment
To: Brent C. Teague

Subj: CONCURRENCE WITH REQUEST TO CONDUCT INTERVIEWS WITH FACILITATE LEARNING EXPERIENCES STUDENTS AND MARINE CORPS CENTER FOR LEARNING FACULTY DEVELOPMENT FACULTY

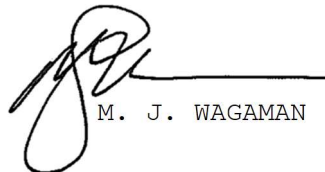
1. After reviewing the proposed study, "Assessing the Transfer of Learning: A Qualitative Case Study on the Acceptance of Knowledge from a Military Faculty Development Center", presented by Mr. Teague, a graduate student at Auburn University, I have granted permission for the study to be conducted at the Marine Corps Center for Learning and Faculty Development.

2. The purpose of the study is to determine if students accept the knowledge acquired through the course of training. The primary activity will be observation, the collection of post course surveys, and the interviews of students twice after the course. Only students in the facilitating learning experiences (FLEX) course are eligible to participate.

3. I understand that observation will occur for two weeks during normal classroom instruction, and interviews will begin during the last days of the regularly scheduled instruction. Interviews will be scheduled so as not to interfere with the student's curriculum. I expect that this project will end not later than June 14 or July 19 depending on the course. Mr. Teague will contact and recruit our students and will collect data at the Marine Corps Center for Learning and Faculty Development.

4. I understand that Mr. Teague will receive consent for all participants and have confirmed that he has the cooperation of the classroom instructors. Mr. Teague has agreed to provide to my office a copy of all Auburn University IRB-approved, stamped consent documents before he recruits participants on campus. Any data collected by Mr. Teague will be kept confidential and will be stored in password-protected Auburn Box folder only accessible by him and his faculty advisor. Mr. Teague has also agreed to provide to us a copy of the aggregate results from his study.

5. Point of contact on this matter is Major M. Joel Wagaman, at 910-450-0224 or Michael.Wagaman@usmc.mil.


M. J. WAGAMAN