

I. Learn About Transfer Theory

The first important protocol to foster transfer from the staff room to the classroom is learning about transfer theory. Some basic facts offer insight into this phenomenon. They include knowing about the evolution of the theory itself and the two major types of transfer that appear in the literature.

Transfer theory: The theory of transfer has evolved over time. There are three significant phases that have occurred: The Bo Peep Phase, the Lost Sheep Phase, and the Good Shepherd Phase (Perkins & Solomon, 1987) Each has helped to shed some light on the idea of transfer.

The *Bo Peep Phase* of transfer basically mirrors the belief captured in the nursery rhyme, Little Bo Peep: “Leave them alone, and they’ll come home, wagging their tails behind them.” In essence, the belief states that if you teach well, with rigor and skill, students will learn. For example, in the early days of transfer theory, the idea of teaching geometry and Latin to all students as ways to “train the mind” was alive and well.

Training the mind, in classical education terms, generally meant to develop critical and creative thinking skills for life through specific exercises required in learning the rarely spoken language of Latin and in constructing the theoretical understandings of geometric theorems in geometry class. Just teach well and they will learn and in turn naturally transfer that learning to all areas of life. This phase gave way to the next.

Even more elusive, the *Black Sheep Phase* generated the theory that transfer was the metaphorical black sheep of the family of teaching and learning. Transfer became the skeleton in the closet, the crazy aunt in the attic. No one seemed to know very much about the concept, its elusive cause, or what to do about it, so the transfer concept became the unspoken secret of the academic community. In fact, there was a period when very little was researched or written about the transfer of learning. It disappeared from the academic world of research and writing.

By contrast, the *Good Shepherd Phase*, presented by Perkins and Solomon (1987), offers hope and insight into the theory of transfer. Explained briefly, this phase reflects the belief that if teachers or trainers “shepherd” transfer, if they pay attention to transfer and keep it in their sights, if they treat it like prized sheep and continually monitor and keep it within the parameters of the “herd,” transfer will not only survive, it will thrive. In brief, transfer will flourish when it becomes part and parcel of the training model and when it is paid as much attention as the initial teaching-learning stages. And, this is where the phase rests currently.

Two types of transfer: There are two types of transfer referenced in the literature. One is simple transfer, close in context to the original learning, and the other is complex transfer, remote and far from the context of the initial learning. Each of these types is handled differently when trying to foster or promote transfer of learning.

The first, *simple transfer*, occurs very near the original learning. The transfer required is similar, and the situation is not that far removed from the first learning. The transfer is so close, in fact, that it is almost automatic. A common example of simple transfer is driving. Once one has learned to drive a car, driving a rental truck is not that different. The transfer is almost automatic, although driving a truck may require a bit more attention than driving a car.

Simple transfer may be achieved when the learning in the new situation “hugs” (Perkins & Solomon, 1987) the learning in the original situation. The more students practice a skill, the more automatic the transfer of that skill becomes. When children practice their times tables, they find it quite easy to automatically transfer the information when solving a math-related problem. The skill is on autopilot!

The second kind of transfer is *complex transfer*, or transfer that is far removed from the original learning. The transfer is not automatic or natural. Instead, it requires mindfulness and careful consideration. Complex transfer requires “bridging” (Perkins & Solomon, 1987) from one scenario to another. It is necessary to think about how to use the skill or the learning in the new context.

Learning about argument and evidence offers an example of complex transfer. As a youngster, one argues with a sibling in unending cycles. Neither understands the formal model of providing evidence to support the argument, even though they may inadvertently give reasons for their point of view. Yet when learning about how to write a persuasive essay, all they know about authentic arguments goes to the wind. Students may take a point of view and then form an argument to persuade others of the worth of their opinion. However, learning how to provide sound details in the form of supporting evidence is often not done intuitively, as when arguing with a brother, but rather consciously and explicitly, as when a student learns to write a persuasive essay with three supporting details. The process is formal, mindful, somewhat deliberate, and possibly laborious.

In summary, both kinds of transfer, simple and complex, are part of professional learning. Staff developers, of course, need to know “hug” and “bridge” learning if they are to promote transfer.