

MICHIGAN STATE UNIVERSITY

# An analysis of the Interest Based Bargaining Workshop Design

*An examination from an adult learning perspective*

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## **I. Statement of Problem**

The immediate problem at hand is the issue of transfer of training. Transfer of training refers to trainees' effectively and continually applying what was trained (knowledge, skills, behaviors, cognitive strategies) to their jobs (Broad & Newstrom, 1992). Trainees are exhibiting transfer issues dealing with one of the two objectives of the workshop; applying interest based bargaining (IBB) to interpersonal conflicts in the workplace. The workshop seeks to teach employees how to use IBB in two main arenas: 1) contract negotiations, and 2) interpersonal conflicts in the workplace. While the workshop participants are able to effectively use what they have learned in IBB to contract negotiations, they are unable to apply this knowledge and skill beyond contract negotiations to other aspects of their work.

This is an important problem for both the trainees and the company. The trainees are not able to use the skills in a manner that the workshop intends to teach and the workshop is not able to meet its objectives. Trainees are investing time and energy into the training and are unfortunately walking away without being able to use IBB as a strategy for interpersonal conflicts in the workplace. The success of the workshop is essentially measured by the transfer outcomes since the transfer outcomes exhibit whether or not the trainees are able to apply the material directly to their job. In this situation, the labor relations agency's training is not successful because of the lack of transfer. In order to be a reputable company, it is important to have positive outcomes. A continuation of negative outcomes could damage the agency's reputation.

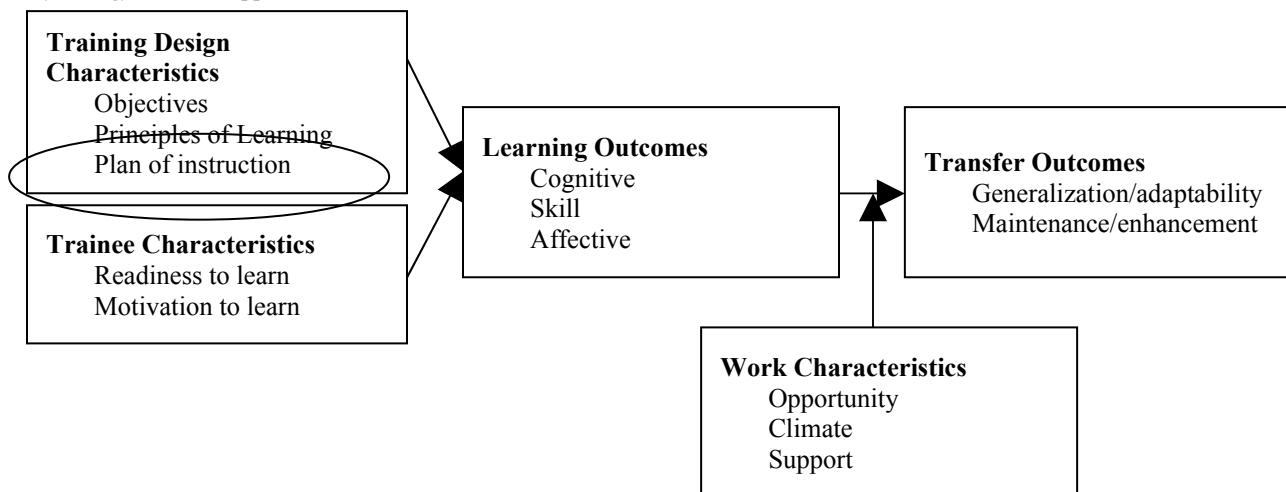
## **II. Contributing Factors**

While there are many factors that could contribute to transfer problems, two apparent factors surrounding the training design have been identified and are the focus of this analysis: 1) Lack of learning principles integrated into the training design, and 2) Lack of the use of situated learning and experience based learning in the instructional plans. A framework on how these factors affect learning and transfer has been provided below in Figure 1 for contextualization. The two contributing factors identified above have been positioned within the circled characteristics "Principles of Learning" and "Plan of Instruction"

under the overarching frame of “Training Design Characteristics”. Baldwin and Ford (1988) present an organized model drawn upon the literature on learning and transfer which depicts the linkages of instructional design, trainee factors, and work characteristics to learning and transfer. Working backwards in the model, learning outcomes that occur during training are seen as having direct effects on transfer outcomes. That is, for trained knowledge and skills to transfer, training material must be learned and retained by the learner (Baldwin & Ford, 1988). In order for learning outcomes to be successfully achieved, trainee and training design characteristics need to be maximized.

**Figure 1.** A model of characteristics affecting learning and transfer outcomes

Source: “Transfer of Training: A Review and Directions for Future Research,” by T.T. Baldwin and J.K. Ford in *Personnel Psychology*, 1988, 41, pp 63-105.



As illustrated in Figure 1, training design feeds learning outcomes which in turn, feeds transfer outcomes. In Jack and Latitia’s workshop, the training design is flawed and the learners are not learning and retaining the information on IBB as it relates to interpersonal conflicts. Before any transfer can occur, learning outcomes needs to be improved. A closer examination of how the contributing factors as related to training design affect learning outcomes is provided below.

### **Contributing Factor #1: Lack of learning principles**

Several important learning principles are noticeably missing or ineffectively used in the training design. Working from Vella's (2002) framework of learning principles, she proscribes twelve learning principles to be implemented in the design of the course that she has found effective across cultures. These principles are summarized in Table 1 below with the missing principles highlighted. A discussion on the missing principles follows.

**Table 1:** Twelve Principles for Effective Adult Learning

|    |  |
|----|--|
| 1  | <i>Needs assessment</i> : participation of the learners in naming what is to be learned        |
| 2  | <i>Safety</i> in the environment and the process   |
| 3  | <i>Sound relationships</i> between teacher and learner and among learners                      |
| 4  | <i>Sequence of content and reinforcement</i>   |
| 5  | <i>Praxis</i> : action with reflection or learning by doing                                    |
| 6  | <i>Respect</i> for learners as <i>decision makers</i>  |
| 7  | <i>Ideas, feelings, and actions</i> : cognitive, affective and psychomotor aspects of learning |
| 8  | <i>Immediacy</i> of the learning   |
| 9  | <i>Clear roles and role development</i>  |
| 10 | <i>Teamwork</i> and use of small groups  |
| 11 | <i>Engagement</i> of the learners in what they are learning                                    |
| 12 | <i>Accountability</i> : how do they know they know?  |

*Needs Assessment.* Jack & Latitia begin sessions with “quick needs-assessment like activities” to help them develop a better idea of the participants' background and experiences in bargaining, conflict resolution, and interpersonal communication strategies. Based on the results, they make minor adjustments to their instructional plan. However, not enough weight or importance is placed on the needs assessment as a tool for designing the course. The workshop is currently constructed based on content and examples that Jack and Latitia have decided should be part of the design and the content may not be useful to this particular set of learners. Each group is different and in order to understand the theme of the group it is important to listen to adult learners prior to designing the course so that themes are heard and

respected. Listening to the learners' wants and needs helps shape a program that has immediate usefulness to adults (Vella, 2002).

*Sequence of content and reinforcement.* The two objectives, applying IBB to 1) negotiations and 2) to interpersonal conflicts in the workplace, are different skill sets and should be treated as such in the design of the learning process. Gagne, Briggs, & Wagner (1992) state that once objectives have been identified they must be sequenced in such a way as to enhance learning activities in the training program. Sequence involves the programming of KSAs in the order of simple to complex and from group-supported to individual efforts (Vella, 2002). The training design does not allow for complex situations or solo efforts (e.g., individual practice on complex situations).

Furthermore, the latter IBB objective is presented towards the end of the workshop and with the assumption that the principles of IBB learned via the contract negotiations piece will carry over to interpersonal conflicts in the workplace. The placement of the objective towards the end of the workshop along with little to no practice could be interpreted by the participants as simply a suggestion or an afterthought. The conference should equip the participants with the skills necessary to resolve conflicts in all situations and this should be initiated from the beginning.

*Praxis.* The workshop is severely lacking in practice and practice with reflection. Role play is used in one instance, but it is used early in the design for contract negotiations and not used for interpersonal conflicts. Vella (2002) asserts that "doing" is necessary for adults to learn concepts, skills, or attitudes. Training of skills should begin with instruction on rules, procedures and factual knowledge relevant to the skills to be learned and, once mastered, move on to practicing the skill (Annett, 1991). While the trainers provide some role playing of IBB in contract negotiations, the trainers only provide "content" regarding the workplace conflicts. In other words, the trainers are teaching them the "know what" rather than the "know how" and the workshop does not include individual practice and application. In addition to practice, reflection with practice is equally important. Two modes, reflection-on-action and reflection-in-action are related to the idea of praxis and are not used in the workshop. Reflection-on-action results in new perspectives, changes in behavior, and commitments to action. Reflection-in-action "consciously"

requires trainees to return to experiences, reevaluate these experiences, decide what could have been done differently, and then try out whatever was decided to do differently" (Merriam, Caffarella, & Baumgartner, 2007).

*Respect for learners as decision makers.* Noticeably missing from the workshop are periodic spurts of time intertwined in the design that allow for dialogue between the teacher and the learner on what topics to discuss next in relation to interpersonal conflicts. Vella (2002) suggests that "new content in the course can be integrated by posing the question: What else do you feel you need to learn about this topic?" This approach makes the content an open system inviting additions editing, and critical analysis, by the adult learners. It also makes the content relevant and immediate to the learners.

*Immediacy.* The trainees may be unclear on the immediacy or usefulness of the new learning in applying IBB to interpersonal issues. Immediacy is the perceived usefulness by the learner and is related to respect for the learner's context, sequence of learning tasks, and the data generated by the needs assessment (Vella, 2002). If the design is devoid of an adequate needs assessment or dialogue (as this workshop appears to be), this may have a negative effect on the immediacy. Contract negotiations involve forced environments with predictable issues (healthcare, wages, pension/retirement plans) and reasonably predictable interests on the part of both union and management. So examples of how to use IBB in this domain may be easier for learners to transfer because the context and content are predictable. Personal day to day issues that managers and union reps experience are not as predictable, involve different personalities and contexts, are messy, and quite complex. While the examples on how to use IBB in interpersonal conflicts given in the workshop may be interesting examples, they again, are examples determined by the instructor and may not be relevant in this context or salient to the learners.

*Accountability.* Vella's (2002) question in regards to accountability is "how do they know they know?" While the learners report high levels of "satisfaction," these are merely reaction outcomes and not skill-based outcomes. In addition to not practicing IBB in interpersonal conflicts, the trainees are not given any type of group assessment, peer assessment or individual assessment on their knowledge, skills, and attitudes on using IBB in interpersonal conflicts. The use of feedback and assessment is paramount to

learning outcomes. The classical study regarding this effect was provided by E.L. Thorndike (1927), who had two groups of subjects repeat sets of the same task over a period of several days. One group was given feedback that established whether their response was right or wrong while the second group was not given any feedback. The group that received the knowledge of results improved considerably in their performance. Feedback allows for one to adjust and improve performance. The use of this activity can be helpful in enhancing learning outcomes, and thus, transfer outcomes.

### **Contributing Factor #2: Lack of situated learning and use of experiences**

The use of situated learning as an instructional strategy is absent in the workshop's training design. In the situated learning approach, knowledge and skills are learned in the contexts that reflect how knowledge is obtained and applied in everyday situations. Situated cognition theory "conceives of learning as a sociocultural phenomenon rather than the action of an individual acquiring general information from a decontextualized body of knowledge" (Kirschner and Whitson 1997). Situated cognition has been seen as a means for tailoring subject matter to the needs and concerns of learners as an instructional strategy (Shor 1987). As mentioned previously, using IBB in contract negotiations is significantly different than using it in interpersonal conflicts. Contract negotiations generally involve predictable topics and predictable conflicts in a predictable environment. In contrast, interpersonal conflicts are not so predictable and can be just as the name suggests, very personal. The context, the situation, and the players all make up a unique recipe for conflict each time.

The learners' experiences and individual problems for which they currently face are not brought into the training design. These would serve as a good starting point because the problems are contextual and already meaningful to the attendees. Boud (1994) describes context as "drawing out and using experiences as a means of engaging with and intervening in the social, psychological, and material environment in which the learner is situated." Context involves the "reexperiencing" of events from

multiple perspectives and does not involve simply bringing life events to the classroom. Rather than being external to the event, learners are actually in and living the experience (Wilson 1993).

As Fenwick (2003) argues, “one cannot separate the learning process from the situation in which the learning is presented.” Knowledge is not received and later transferred to another situation “but part of the very process of participation in the immediate situation” (Fenwick, 2003). In the situated view of learning, learning for everyday living only happens when people interact with the unique combination of “the community, the tools at hand, and the activity at hand. In other words, the physical and social experiences and situations in which learners find themselves and the tools they use in that experience are integral to the entire learning process.” (Fenwick, 2003).

Lankard (1995) brings an interesting perspective in regards to how learning is driven by dilemmas in situated learning. He proposes that students learn content through activities rather than obtaining information in predetermined packages organized by the instructors. “Content is inherent in the doing of the task and not separated from the noise, confusion, and group interactions prevalent in real work environments. Learning is dilemma driven rather than content driven.” (Lankard, 1995). The benefit of dilemma driven learning is that situations are presented that challenge the intellectual and psychomotor skills learners will apply at home, in the community, or the workplace, which will in turn enhance the learning process. While examples are given in the workshop, examples are given with how IBB was used embedded in the example. These are not dilemma driven examples as they do not challenge the learner to work through the problem.

### **III. Recommendations**

A series of recommendations have been provided which address both of these contributing factors. These recommendations involve a redesign and restructure of the workshop with the goal of enhancing learning outcomes and in effect, transfer outcomes in regards to utilization of IBB in interpersonal conflict situations. Appendix 1 includes an outline of the proposed workshop plan for easy reference.

To address the lack of learning principles in the training design, the following recommendations are proposed:

- Design a pre-training needs assessment to capture interpersonal conflicts specific to the group of participants and place more emphasis on utilizing these conflicts in shaping portions of the workshop.

This can be done via e-mail, phone conversations and surveys. According to Vella (2002) a well distributed sample of even 10 percent of the group can give important information for the design of the conference.

- Present both objectives of IBB at the beginning of the course and sequence the training content for the use of IBB in interpersonal conflicts in order from simple to complex (e.g., teaching of IBB knowledge, to problem based learning exercises, to role playing exercises of actual participant conflicts previously identified through the needs assessment).
- Incorporate more learning by “doing” and allow for significant practice with exercises such as role playing.
- Empower the learners to make content decisions by adding dialogue throughout the course of the workshop (e.g., learning checkpoints, feedback to instructors regarding content, Q&A sessions) to allow for revisions of the workshop content to enhance the learning experience for the trainees.
- Integrate performance feedback sessions after practice of using IBB in interpersonal conflict situations (e.g., individual assessment, peer assessment).

To address the lack of situated learning and experience based learning, the following recommendations are proposed:

- Once equipped with IBB knowledge as it relates to interpersonal conflicts, add time in the workshop for critical reflection in a journal. Utilize the following four step process in order to guide reflection on past interpersonal conflict experiences (York-Barr et al., 2001): 1) Participants pick an event and ask themselves what happened, 2) Why did things happen this way? Why did I act this

way? How did the context affect the experience? Did past experience affect the way I reacted?, 3) What have I learned from this event? How can I improve? How might this change my future thinking, behaving, and interactions?, 4) What am I going to remember to think about next time this situation comes up? How could I set up conditions to increase the likelihood of productive interactions and learning?

- Heavily draw upon learners' interpersonal conflict dilemmas as identified through the needs assessment or as they come up in the dialogue to shape problem based learning or role playing activities.
- Use identified learner dilemmas as a basis of group reflection via a community of practice to gain multiple perspectives on contextual issues.

#### **IV. Possible Challenges and Plan to Overcome**

Although these recommendations can significantly enhance the learning outcomes from the training, a few possible challenges have been identified along with suggestions to overcome these challenges.

First, the activities provided in the recommendations will involve more time. Role playing, individual practice, and peer assessment will undoubtedly require more time. This has implications for the length of the workshop which is currently one full day. The workshop could be split into two days. The outline of the proposed workshop plan is currently provided in a one-day format with the assumption that Jack and Latitia will split the workshop if feasible.

Second, the design of the workshop includes participants from various departments and organizations. The values, norms, and culture of each organization may be vastly different. Situations described by learners may be more applicable to one organization but not the other. One solution is to group people according to their specific organization for a part of the day so they can work collaboratively.

Third, the learners' goals may not be aligned with the goals of the workshop. Although the workshop has two objectives, the learners may simply be drawn to the workshop for use of IBB in contract negotiations, not for use of IBB in the workplace, since the latter objective isn't as heavily emphasized. Thus, the learners may be attending the workshop with certain expectations in mind which may be more geared towards the use of IBB in contract negotiations. To overcome this problem, the workshop needs to place equal emphasis on both objectives in all forms of their marketing, communications, and advertising.

Finally, as illustrated previously in Figure 1, workplace characteristics such as opportunities for use of the new skill, the working climate and support for the use of the new training also has an effect on transfer outcomes. Even if the training design has been revised so as to enhance learning outcomes and transfer, these workplace characteristics may prove to be real barriers to the participants. Unfortunately, overcoming these barriers isn't something that the training design can necessarily overcome. However, the trainers can develop a worksheet/survey that participants can use to assess the degree to which these work characteristics as barriers are present. The trainers can then help the participants be prepared for these obstacles and construct plans of action in which the participant can overcome these obstacles.

## Appendix 1. Sketch of revised workshop plan

| <b>Pre-Workshop Activities</b>                      |   |
|---|---|
|   | Needs assessment to identify themes relevant to the group   |
| <b>Workshop: Day 1</b>                              |   |
| <b>Introduction to IBB</b>                          |   |
| Morning   | <p>Presentation of Objectives</p> <ul style="list-style-type: none"> <li>• To be able to effectively use IBB in contract negotiations</li> <li>• To be able to effectively use IBB in interpersonal conflicts in the workplace</li> </ul>                 |
|   | Ice breaker activities  |
|   | Powerpoint presentation on principles and benefits of IBB   |
|   | Video examples of the use of IBB in contract negotiations <ul style="list-style-type: none"> <li>• Small group debriefing and reflection</li> <li>• Large group debriefing and reflection</li> </ul>  |
|   | Video examples of an effective use of IBB in interpersonal conflicts in the workplace <ul style="list-style-type: none"> <li>• Small group debriefing and reflection</li> <li>• Large group debriefing and reflection</li> </ul>                          |
|   | Break   |
| <b>IBB and Contract Negotiations</b>                |   |
| Morning   | <p>Small group problem-based learning activities based off of examples provided by participants through needs assessment</p> <ul style="list-style-type: none"> <li>• Large group debriefing and reflection</li> </ul>                                    |
|   | Individual problem-based learning activities based off of examples provided by participants through needs assessment <ul style="list-style-type: none"> <li>• Small group debriefing and reflection</li> </ul>  |
|   | Learning checkpoint   |
|   | Individual critical incident reflection in journal  |
|   | <ul style="list-style-type: none"> <li>• Sharing of incidents in small groups with group reflection</li> </ul>  |
|   | Small group role playing using scenarios meaningful to the group (with repetition of the exercises and assessment) <ul style="list-style-type: none"> <li>• Individual assessment</li> <li>• Peer assessment</li> </ul>                                   |
| <b>Q &amp; A on IBB and Contract Negotiations</b>   |   |
| Lunch Break   |   |
| <b>IBB and Workplace Interpersonal Conflicts</b>    |   |
| Afternoon   | <p>Small group problem-based learning activities based off of examples provided by participants through needs assessment</p> <ul style="list-style-type: none"> <li>• Large group debriefing and reflection</li> </ul>                                    |
|   | Learning checkpoint   |
|   | Individual critical incident reflection in journal  |
|   | <ul style="list-style-type: none"> <li>• Sharing of incidents in small groups with group reflection</li> </ul>  |
|   | Large group role playing using scenarios from needs assessment <ul style="list-style-type: none"> <li>• Large group debriefing and reflection</li> </ul>  |
|   | Small group role playing using scenarios meaningful to the group (with repetition of the exercises and assessment) <ul style="list-style-type: none"> <li>• Small group reflection</li> <li>• Individual assessment</li> <li>• Peer assessment</li> </ul> |
| <b>Q &amp; A on IBB and Interpersonal Conflicts</b> |   |
| Break   |   |
| <b>Wrap Up</b>                                      |   |
| PM  | Group Reflection on IBB   |
|   | Individual plan of action on using IBB  |

|  |  |
|--|--|
|  | “Workplace Characteristics Challenges” identification survey and reflection on how to overcome<br>• Small group debriefing and reflection on the challenges and plan to overcome |
|--|--|

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