Putting learning to work: Knowledge transitions from continuing professional education to museum workplaces

by

Joy Anne Davis
B.A., University of Victoria, 1974
MMSt., University of Toronto, 1978

A Dissertation Submitted in Partial Fulfillment
of the Requirements for the Degree of

DOCTOR OF PHILOSOPHY

in the Department of Curriculum and Instruction

© Joy Davis, 2011
University of Victoria

All rights reserved. This dissertation may not be reproduced in whole or in part, by photocopy or other means, without the permission of the author.

Supervisory Committee

Putting learning to work: Knowledge transitions from continuing professional education to museum workplaces

by

Joy Anne Davis
B.A., University of Victoria, 1974
MMSt., University of Toronto, 1978

Supervisory Committee

Dr. Alison Preece (Department of Curriculum and Instruction)
Co-Supervisor

Dr. Helen Raptis (Department of Curriculum and Instruction)
Co-Supervisor

Prof. Martin Segger (Department of History in Art)
Outside Member

Dr. Patricia MacKenzie (School of Social Work)
Outside Member

Abstract

Supervisory Committee
Dr. Alison Preece (Department of Curriculum and Instruction)
Co-Supervisor

Dr. Helen Raptis (Department of Curriculum and Instruction)
Co-Supervisor

Prof. Martin Segger (Department of History in Art)
Outside Member

Dr. Patricia MacKenzie (School of Social Work)
Outside Member

As an initial qualitative enquiry into the dynamics of learning transfer in the museum sector, this dissertation explores a range of largely positive learning transfer experiences within four museum case settings, and highlights the interdependent roles of museum climates and learners' agency in supporting prolonged and complex processes of adapting learning to meet situated needs. Key findings from a cross-case thematic analysis include the influential roles that learners' mastery of content, positional autonomy, perception of affordances, dispositions, values and goals, initiative and professional affiliations play in initiating transfer in museum contexts that tend to be inspiring, rewarding, but benignly un-strategic in their efforts to support the transfer of learning. My focus on learning that continues after participants leave the classroom illuminates how complex, situated, subjective, and meaningful continuing professional education can be in museum settings—and how it continues to involve the learner and the museum long after the educator's work is done.

Table of Contents

Supervisory Committee....ii
Abstract....iii
Table of Contents....iv
List of Tables....vii
List of Figures....viii
Acknowledgments....ix

Chapter 1 Introduction....1
The Problem....1
Rationale for and Benefits of this Study....4
Guiding Concepts....7
A definition of transfer....7
Learning for the workplace....8
The dynamics of transfer....10
Distinctive museum characteristics that impact transfer....12
Dissertation Structure....16
Study Challenges....17
Cultural Resource Management Program....20
Summary....22

Chapter 2 Relevant Literatures and Themes....23
Reviewing the Museum Literature....24
Coverage....25
Reviewing Learning Transfer Literatures....26
Diverse perspectives on transfer....27
Coverage....32
A Guiding Framework for Research....34
Relevant Concepts and Transfer Factors....38
What kinds of knowledge do museum professionals work with?....38
Evolving knowledge for museum professional practice....39
Knowledge types and qualities....40
Content for museum continuing professional education....45
How does continuing professional education support learning transfer?....49
Education for museum professional practice....49
Agency and Affordances as Interdependent Phenomena....58
How Does the Workplace Influence the Application of Learning?....59
Organizational factors....61
Positional factors....73
How does the Learner Shape the Transfer Process?....78
Agency for transfer....79
Ability factors....82
Capacity factors....85
Motivational factors....89
Museum workers as agentic professionals....95
The Likelihood of Transfer....101

Chapter 3 Methodology and Procedures 103
Comparative Case Study Methodology 103
Case Selection 105
Unit of analysis 105
Scope of study 105
Selection criteria and outcomes 105
Informed consent 108
Anonymity and confidentiality 108
Ethical considerations 109
Validity 110
The role of guiding theory 111
Construct validity 112
Data collection and management 112
Data collection 113
Data management 115
Data analysis and interpretation 116
Methodological Challenges That Impact Study Design 120
Summary 122

Chapter 4 Transfer Experiences 123
High Desert Museum 123
Organizational climate for transfer 125
Summary of organizational transfer factors 132
Personal agency for transfer 132
Summary of agency factors 137
Transfer experiences 138
Reflections 142
Fortress of Louisbourg 143
Organizational climate for transfer 144
Summary 150
Personal agency for transfer 151
Summary 155
Learning transfer experiences 155
Reflections 160
Musée Heritage Museum 161
Organizational climate for transfer 162
Summary 166
Personal agency for transfer 167
Summary 170
Transfer experiences 170
Reflections 175
Gwaii Haanas 176
Organzational climate for transfer 179
Summary 186
Personal agency for transfer 187
Summary 191
Transfer experiences 191
Reflections 196

Chapter 5 A Comparative Case Analysis 197
Thematic Analysis 198
Museum Climates for Transfer 198
Organizational factors 198
Reflection on organizational climates for transfer 217
Position factors 218
Reflections on climates for transfer in case settings 233
Learners' Agency for Transfer 234
Learners' ability factors 237
Learners' capacity factors 245
Learners' motivational factors 249
Reflections on learners' agency for transfer 263
Common and Divergent Transfer Factors across Cases 265

Chapter 6 Discussion and Implications 271
Key Findings 272
Transfer experiences 272
Museum climates for transfer 278
Learners' agency for transfer 283
A reflection on intentionality 292
Interdependence of workplace conditions and agency in transfer experiences 292
Transfer dynamics that are distinctive in museum work 295
Strengths and Limitations 299
Implications and Further Research 302
Learners' agency 303
Case museums' climates for transfer 304
The Cultural Resource Management program 306
Professional associations 308
Transfer propositions 309
Conclusion 312

Bibliography 313

Appendices 333
Appendix A: University of Victoria Human Ethics Review Certificate 334
Appendix B: Research Protocol 335
Appendix C: Surveys on Degrees of Autonomy and Initiative 368
Appendix D: Coding Protocol 370
Appendix E: Sample Thick Description – Fortress of Louisbourg 373

List of Tables

Table 1: Approaches to Workforce Development....67
Table 2. Likelihood of organizational change. 71
Table 3. Facilitating and inhibiting conditions for change in history organizations. 72
Table 4. Case settings....107
Table 5. Interview data 115
Table 6. Johnson's transfer experience....141
Table 7. Fougère's Transfer Experience 160
Table 8. Approaches to workforce development in case settings 210
Table 9. Facilitating and inhibiting conditions for organizational change 215
Table 10. Likelihood of organizational learning in case settings....216
Table 11. Survey of autonomy in case settings....246
Table 12. Survey of initiative in case settings....259
Table 13. Commonality and difference in transfer experiences....265
Table 14. Commonality and difference in workplace climates....267
Table 15. Commonality and difference in learners' agency 268
Table 16. Alignment with theoretical propositions....310

List of Figures

Figure 1. Workplace Learning, from Illeris (2004) 10
Figure 2. Four categories of learning transfer factors. 37
Figure 3: Influential Factors in Learning Transfer in Museums 199
Figure 4. Museum learning environments 211
Figure 5. Museum workplace learning, adapted from Illeris (2004) 275
Figure 6. Relational interdependency of agency and climate 278
Figure 7. Notable transfer dynamics in museum case settings 291

Acknowledgments

Among the pleasures of a project of this scope and nature are the people who have encouraged, supported and contributed to my research. Their input has been critical in so many ways. Particular thanks are due to Barbara Wilson, Anne Ramsden, Ruby Fougère, Tracy Johnson and to their colleagues for sharing their stories and perspectives with me—their commitment to learning, their passion for cultural heritage, their insight and their interest in ways in which to make practice meaningful, have been inspiring and enlightening. I thank them for the warm welcomes that they extended to me, the humour and occasional tears that punctuated our conversations, and their thoughtful feedback throughout the research process. I hope that this project captures and honours the experiences that they shared.

The thoughtful support of my supervisory committee has also been central to this project. I particularly want to acknowledge the important role that Dr. Laurie Baxter played in the early conceptualization stage before she had to step away from the project. The ways in which she balanced enthusiastic support for my topic with critical insights on my approach were instrumental in narrowing, focussing and defining my study—and in developing my appreciation of both the rigour and creativity inherent in scholarship.

Dr. Helen Raptis and Professor Martin Segger have also played very important roles throughout this project as mentors, consultants, and consistently positive, accessible and insightful reviewers. Their interest, questions, critiques and suggestions have been influential at every stage. Dr. Alison Preece and Dr. Patricia MacKenzie joined my committee at the critical stage when the analysis and interpretation were taking shape – their fresh eyes, challenging questions and interest in my work have been much valued and appreciated.

The Social Foundations in Education Program in the Department of Curriculum and Instruction has also provided an important academic and philosophical context for this study. I particularly appreciate the interest and support offered by Dr. David Blades throughout my studies.

Completing a PhD while also working holds particular challenges. I value the consistent interest and encouragement provided by Dr. Maureen MacDonald, Dean of the Division of Continuing Studies. The Division's commitment to the professional development of all its staff has created an environment that makes it possible to tackle and persevere with this project – and to recognize its relevance to my own practice. My colleagues' ongoing support and interest

has also been critical at all turns. I particularly want to acknowledge the important role that Brenda Weatherston has played in stimulating my thinking about how learning makes transitions from the classroom to the workplace and extend my sincere thanks for her leadership of the Cultural Resource Management Program during my study leave. I also appreciate Quvi Taylor's contributions in editing and formatting this document.

Even as my academic and professional support systems have been vital to my doctoral studies, my personal supports have sustained me throughout this process. When you are balancing work, studies, a household and all the pleasures and demands of family and friends, having a supportive partner is critical. Thank you, Rod, for your encouragement, your understanding that those intensive and extended periods of study, research and writing were part of the process, and your interest in both the methods and the outcomes. I couldn't have done it without you!

Chapter 1 Introduction

Few professionals in the museum world would question the value of learning throughout careers to build knowledge and skills for effective practice. Diverse specialists across the sector recognize learning as an important component of working life and career advancement. Museums and museum associations affirm that evolving competencies are essential to operational effectiveness, productivity, and employee performance and retention, and they put resources in place to support learning. And a range of educational activities offer insight to both best practices and emergent issues. However, beyond anecdotal accounts of exciting accomplishments or observations that concepts have been challenging to apply, little is known about whether and how learning from continuing professional education makes meaningful transitions to the workplace.

The purpose of this dissertation is to contribute to our understanding of the experiences of museum professionals as they return to their workplaces from continuing education with newfound knowledge relating to museum practices. In focussing on this topic, this study problematizes the general assumption that when professionals participate in such coursework, the outcomes are consistently beneficial for both the learner and the workplace. A comparative case study methodology is employed to consider the following research questions:

- What are the experiences of museum professionals as they seek to apply concepts, principles and skills that they have gained through continuing professional education?
- How do conditions in the workplace shape these experiences? and
- How does personal agency influence museum professionals' inclination to put new learning to work?

The Problem

Every year, thousands of museum professionals participate in learning activities designed to strengthen and further specialize their practice. Of these, approximately 300 professionals from across North America and as far afield as Kenya, take intensive or online courses on current and emergent practices through the Cultural Resource Management (CRM) Program at the University of Victoria. Most are balancing studies with work and personal commitments as they complete 12 courses toward a post-degree diploma. As director of this

program, my reviews of course evaluations over the past decade tell me that a total of 92% report that CRM course experiences have been very positive (73%) or positive (19%). Words such as 'transformative,' 'inspiring,' 'energizing,' and 'excellent' appear in the narrative portions of course evaluations. Assignments demonstrate mastery of content and grades are good. Clearly, attendance and short term measures of success for this program point to a satisfied and successful group of adult learners at the time they leave campus or finish distance courses.

Throughout my involvement with this program however, I have had little opportunity to understand what museum professionals do with their learning once they return to the workplace, despite the contention in the literature of learning transfer that students' capacity to apply their learning is the 'holy grail' of education (Resnick, 1989). Since CRM students return for subsequent courses, staff surmise that they see value in their studies, but no program research has been undertaken to explore the degree to which knowledge and skills gained in the classroom are useful in museum settings. The lack of evidence of the longer-term impacts of the program limits our understanding of the holistic educational needs of museum professionals, and restricts discussion of the returns on educational investments made by the student, the workplace, the sector, and the university. Understanding *how* we make a difference looks beyond student satisfaction, beyond learning that takes place in the classroom, to focus on the changes—positive and negative—that take place when learners seek to apply newfound knowledge and skills in their lives, workplaces and communities. These changes are perceived as significant and influential outcomes of education, but as they get further and further removed from the learning event, they get harder and harder to evaluate in valid and meaningful ways.

Lack of systematic understanding of long-term outcomes and impacts of continuing professional education (CPE) in the museum sector is not unique to the CRM program. A review of museum literature reveals few critical perspectives on the practical and long-term benefits–or shortcomings–of this approach to learning for professional practice. Instead, CPE is commonly discussed as beneficial and appropriate by workers, museums, and the sector in general. For example, discussions of professionalism extol the virtues of learning throughout the career (Bailey, 2006; Genoways, 2006; Lester, 2000; Marty, 2006; Ruge, 2008; Tran & King, 2007; Washburn, 1986; Weil, 1988a). Curricula and competency and best practice expectations provide frameworks to shape and gauge core and specialized expertise (eg, CMA, 1995b; Irvine, 2008; Museums Alberta, 2001). Professional associations embed expectations for staff development within codes of ethics and guidelines for practice (CMA, 1999; ICOM, 2006;

Museums Association, 2008). Academic institutions and professional associations offer diverse professional development programs, conferences and workshops, using both face-to-face and online delivery methods to facilitate access. Museums allocate resources for staff development, and museum workers participate in offerings designed to enhance their workplace expertise and progress toward career goals. And in a period of significant change, CPE is explicitly linked with museums' capacity to keep pace with a range of social, economic and technological factors that are reshaping their roles, purposes and work design (e.g., AAM, 2009; N. Fuller, 2005). As Weil (2002) notes, "tomorrow's museums cannot be operated with yesterday's skills" (p. 46).

Benign and largely positive views of CPE are tempered by a few voices that raise concerns about the efficacy of the system, given the increasing complexity of museum practice (Davis, 2001; N. Fuller, 2005; Genoways, 2006). Fuller (2005) comments that, while there is consensus on the importance of professional development, "the need to maintain a creative and talented professional workforce is an undertaking that deserves more than ad hoc efforts" (p. 275). Demos (2003), in the thoughtful study of the British museum sector *Towards a Strategy for Workforce Development*, is another critical voice:

> There is awareness at a generalised level of the benefits of training and development in terms of helping achieve organisational goals, such as improved productivity, retaining people, and improving the quality of services provided. However, there is little evidence of systematic evaluation of the impact of specific training and development programmes on achieving organisational goals, with training often isolated from other activities and service developments. The necessary step-change in employer investment in workforce development will not and should not happen by exhortation alone, but needs to be evidence-based. More needs to be done to capture the knowledge gained from previous and current investments in workforce development initiatives. (p. 29)

A review of the literature also indicates that the little empirical research that has been conducted on CPE in the museum sector focuses on needs assessment, labour market conditions and program evaluation (e.g., CHRC, 2002; Bailey, 2006; Cannizzo et al., 1980; CMA, 1995a; Cole, 1996; Davies, 2007; Ekos, 1988; Jolliffe, 1984; Potvin, 2007a, 2007b; Schmitigal, 2005; Segger, 1976; Stark, 2008; Tlili, 2008; Tran & King, 2007). In my initial review of museum literatures associated with CPE, I found no research on the long-term effectiveness of CPE or the transfer conditions that should be in place to maximize returns on considerable investments of both time and scarce funding that individuals, museums and educational institutions make in work-related learning. This dissertation is a first step in documenting, analyzing, and developing a better understanding of the dynamics, benefits and problems that accompany the transition of

learning from the professional development classroom to the museum workplace. Research that looks beyond course experiences to examine ways in which participants apply their learning can range from instrumental assessments of programs and their impacts, to qualitative explorations of the lived experience of the people in those programs. Undertaking such research can deepen understanding of our practice, our learners, and the responsibility and potential we hold as educators. At the same time, assessing impacts can encourage us to critically reflect on assumptions, structures, power relationships and value systems that we bring to the programming process.

Rationale for and Benefits of this Study

In focussing on learning transfer as an unexplored aspect of museum continuing professional education, this study responds to a concern expressed in the broader literature of workplace learning that "we have a great need for rigorous in-depth empirical research that traces what people actually do and think in everyday work activity, and for research methods that can help illuminate the learning that unfolds in everyday work" (Fenwick, 2008, p. 25). Although the study of learning transfer promises to offer valuable insights on the effectiveness of CPE in the museum sector, I undertake this study knowing that the transfer of learning is not, itself, a clear-cut or straightforward area of enquiry despite its central role in the study of learning (Carraher & Schliemann, 2002). Diverse, closely held and at times contentious philosophical stances are offered, to the point that various authors have described the overall discourse of learning transfer as "a study in frustration" (Carraher & Schliemann, 2002, p. 3), with "widely divergent points of view" (De Corte, 1999, p. 556) and "little agreement" (Lobato, 2006, p. 431) on "a multifaceted problem at the core of learning" (Pea, 1987, p. 639) that can be "highly metaphorical and elusive" (Saljo, 2003, p. 312), with "serious glitches in its workings" (Haskell, 2001, p. 12). Varied uses of language and definitions, differing views of key concepts, conceptual overlaps, and inadequate and inconclusive empirical evidence all complicate exploration of the learning transfer process. As Leberman et al. (2006) note, transfer is:

> ...complex, multifaceted and at times a confusing process, but one that is important to understand because it is so intimately related to training and education and therefore pivotal in promoting learning. In the fields of education, psychology and management it is recognized as a central concept that facilitates all development and yet many people working in these areas do not adequately understand transfer technology. (p. 6)

Leberman et al. and many other transfer scholars make a valuable point about the importance of understanding transfer as a measure of educational effectiveness. Beyond highlighting educational outcomes, a study of transfer also builds understanding of ways in which both learners and their museums realize and are accountable for return on educational investments. The general literature of learning transfer suggests that relatively little content learned in CPE makes meaningful transitions to the workplace. At the same time, it contends that a range of factors associated with content, educational methods, the learner and the workplace are influential in supporting or inhibiting transfer processes. While CPE specialists in the museum world acknowledge the importance of relevant content and effective pedagogy, their understanding of the influence of both individual agency and workplace conditions on transfer *after* a course has ended is only based on conjecture. My interest in these unexplored learner and workplace factors shifts my focus from the established discourse of museum continuing education to a focus on the participatory process of constructing learning for and in the workplace (Hager, 2004), and offers insight on little understood but critical components of learning and transfer processes that are at play in museums. Accordingly the research questions that guide this study focus on transfer dynamics once learners return to museum workplaces. My first overarching question relates to the nature of such occurrences by asking:

- What are the experiences of museum professionals as they seek to apply concepts, principles and skills that they have gained through continuing professional education?

The other two questions probe factors that influence transfer dynamics within museums:

- How do conditions in the workplace shape these experiences?
- How does personal agency influence museum professionals' inclination to put new learning to work?

These questions encompass issues relating to professionalism, continuing education, individual agency, museum practice, and workplace learning, and they anticipate inherent complexity in understanding variables that influence transfer processes. Their focus on learners' subjective experiences in social settings aligns with the interpretive and qualitative paradigm that frames this study. My approach is grounded in an epistemological view that knowledge, including professional knowledge, is constructed and made meaningful through social and personal experiences. As such, learning cannot be understood as a commodity that can be acquired in one setting and applied in another. Focussing on learners' stories of transfer

experiences offers a rich, nuanced and holistic view of the subjective outcomes of their engagement in both CPE and workplace social processes. The core concepts and propositions that inform these questions are presented in greater detail in Chapter 2.

With this interest in the social experiences of learners as a starting point—and knowing that learning transfer has not been previously studied in museum settings—my choice of a comparative case approach provided an appealing means of exploring transfer factors and dynamics in the contexts in which CRM graduates make their learning meaningful. The comparative case method offered "a high degree of explanatory richness" (George & Bennett, 2005, p. 31) that allowed me, as a newcomer to learning transfer, to explore the museum-based conditions that shape ways in which CRM graduates exercise agency to make use of their learning. In keeping with both the strengths and limitations of the comparative case method, this study considers the complex circumstances at play in learning transfer in situated settings, but does not seek to measure them or to establish definitive causal mechanisms. While its results are not generalizable across the museum sector, they are of analytic value in testing and contributing to learning transfer theory, and they offer insights on a number of characteristics of museums and museums workers that can be of value in refining approaches to continuing professional education. And to the degree that readers recognize their own experience in these cases and findings, they stimulate reflection and enquiry. More specifically, this study:

- offers insight on how learners interact within museum social settings to pursue continuing professional education and to apply new knowledge and skills during and after professional development coursework;
- analyses patterns associated with individual and workplace factors that are perceived as instrumental in facilitating transfer in a variety of museum settings;
- identifies transfer factors that may be of special significance in museum practice;
- identifies the challenges that workers and museums face in creating conditions which facilitate transfer;
- suggests strategies to strengthen teaching for transfer in continuing professional education programs; and
- expands the workplace learning discourse to include the experience of museum workers, museum activity systems, and other not-for-profit workers and organizations.

Guiding Concepts

As noted, the study of transfer[1] is characterized by a "confusing array of concepts, terminologies, techniques and models" (Subedi, 2004, p. 595), many of which are defined by the epistemological stance of the scholar. In sifting through this rich literature to identify core concepts and themes that frame this enquiry, I draw on many perspectives, but favour socio-cultural explanations that capture the importance of social context by taking an epistemological position that emphasizes the relational interdependence of:

> ...agent and world, activity, meaning, cognition, learning and knowing. It emphasizes the inherently socially negotiated character of meaning and the interested, concerned character of the thought and action of persons-in-activity. This view also claims that learning, thinking, and knowledge are relations among people in activity in, with, and arising from the socially and culturally constructed world. (Lave & Wenger, 1991, pp. 50-51)

Concepts of learning transfer that emerge from this domain stress the contingent nature of knowledge in a socially and culturally constructed world, along with the likelihood that learners' ways of knowing are further transformed as they are applied in new settings.

A definition of transfer

A definition of learning transfer offered by Eraut (2004) reflects this stance and is grounded in his research (e.g., Eraut, 1994, 2004; Eraut & Hirsch, 2007) on the ways in which professionals in particular make learning meaningful in practice. He considers transfer to be **"**the learning process involved when a person learns to use previously acquired knowledge/skills /competence/expertise in a new situation" (p. 212). While this definition, like many others, does not prescribe where learning is undertaken or applied and it focuses on individual agency, it emphasizes that transfer itself is an ongoing and situated learning process that takes place *after* new knowledge and skills are acquired. In taking this approach, Eraut's definition suggests that learning for transfer involves a process of evaluating the relevance of learned knowledge and of considering how it is best applied as the learner participates in workplace activities. In this view,

[1] The use of the term 'learning transfer' is contested, largely because 'transfer' suggests a straightforward and replicative transaction and does not capture complexities inherent in the movement of knowledge across settings and over time (Hager & Hodkinson, 2009). Other descriptors are offered, including 'consequential transitions' (Beach, 1999), 'productivity' (Hatano & Greeno, 1999), 'knowledge transfer' (Haskell, 2001), 'situated generalization' (Carraher & Schliemann, 2002), and knowledge diffusion' (Thompson *et al.*, 2006). However, as none of these have replaced the term 'learning transfer' as the primary descriptor in the literature (Hager & Hodkinson, 2009), my study uses 'learning transfer' in the interest of clarity and consistency, while keeping in mind the social and relational nature of transfer.

transfer is socially negotiated, contextually determined and largely subject to the capacity of the learner to take additional steps to make learning useful.

Since this complementary transfer learning process normally takes place in the workplace setting, this definition also shifts an important component of transfer activity from the classroom to the workplace itself. In doing so, it brings into play the complex, relational and co-participative (Billett, 2008; A. Fuller & Unwin, 2004) negotiations involved in the constant construction of knowledge that are seen to occur within workplace settings well after learning is undertaken in classroom settings (Hager, 2011). Eraut's holistic definition is well suited to this enquiry on learning transfer in museums as it establishes the unit of analysis as the social setting in which learning is applied, while also encouraging a focus on the experiences of museum workers in negotiating the gap between the classroom and the workplace.

Learning for the workplace

Eraut's emphasis on transfer as a complex and ongoing socio-cultural learning process that may be embedded in the activities, tasks and social relations of the workplace challenges traditional metaphors of the acquisition and transfer of knowledge that are encountered in conventional cognitive and behaviourist paradigms of learning (Hager & Hodkinson, 2009; Sfard, 1998), and which tend to characterize how CPE has been designed and delivered.

> Implicit in most current [professional development] literature is an objectivist epistemology that views knowledge as a transferable object. Thus, professionals' knowledge can be "topped up" by undertaking PD [professional development] activities. This perspective implicitly conceptualizes professional knowledge as primarily cognitive, "acquired" through learning, and able to be studied separately from the socio-cultural context in which the knowledge is used. Thus, many studies also assume a dualist ontology that implies professionals can be studied in a meaningful way separate from their professional practice. Reframing this conceptualization of PD requires moving from a focus on "development" to "learning" and from an "atomistic" perspective to a "holistic" approach. (Webster-Wright, 2009, p. 713)

Defining transfer as a comprehensive and adaptive learning process demands such a holistic approach. From the factors that initially motivate educational engagement, to the construction of knowledge in the classroom, to the process of sorting out how learning is further adapted to be of sustained use, a range of ongoing and participatory learning activities shape the transfer process to the point that some scholars question the study of transfer as a separate phenomenon. Haskell (2001), for example, notes that transfer is "is the very meaning of learning itself" (pp. 3-4), while Detterman (1996) sees transfer as "a derivative of more basic [learning]

processes" (p. 19), and calls it an *epiphenomenon* that is a by-product of learning. As Hager (2011) notes, "socio-cultural theories emphasize learning as an ongoing process of participation in suitable activities, thereby rejecting the primacy of learning as product. …Whereas learning as product dovetails neatly with the acquisition and transfer metaphors, learning as process accords with the metaphor of participation" (p. 23).

In keeping with Eraut's conception of transfer as a complementary learning process, the subsequent and ongoing learning that takes place through post-course participation in museum work to facilitate transfer becomes critical. Accordingly, socio-cultural theories of workplace learning processes hold considerable relevance in this study, and classroom and workplace learning become sufficiently intertwined that the task of distinguishing meaningful classroom learning as an antecedent to, an object of, or an outcome of transfer is challenging. Just as learners' prior experiences and museum needs shape how knowledge that is presented in-class is construed and interpreted, so these continue to influence the subsequent process of learning in museum settings to make such knowledge meaningful. Rather than seeing knowledge as something that can be acquired and used, this view of learning shifts the study of transfer from an objective and measurable transaction to a social and subjective process whose outcomes vary in accordance with both personal and museum dynamics.[2]

A holistic model (Figure 1) that illustrates the interdependence of individual and social factors inherent in learning for and in the workplace is offered by Illeris (2004, p. 438). In developing this model, Illeris both distinguishes and connects individual and social levels of learning for professional practice and depicts their dialectic interplay. While this model does not specifically address learning transfer dynamics, it provides a useful framework for tracing the complex factors that combine to shape learning processes inherent in transfer activity. Illeris stresses that the overlap between working identity and work practice is of critical importance in learning for the workplace. "It is here that the employees' identities influence and develop the practice of the community, and the community's practice forms the individual working identity, and learning takes on its specific character of learning in working life" (p. 439).

[2] Cairns and Malloch (2011) point out other dichotomies that are challenged when learning is perceived as a social and subjective process: informal/formal; experiential/theoretical; education/training; physical/intellectual; tacit/explicit; pure/applied; action/theory; classroom/workplace (p. 11).

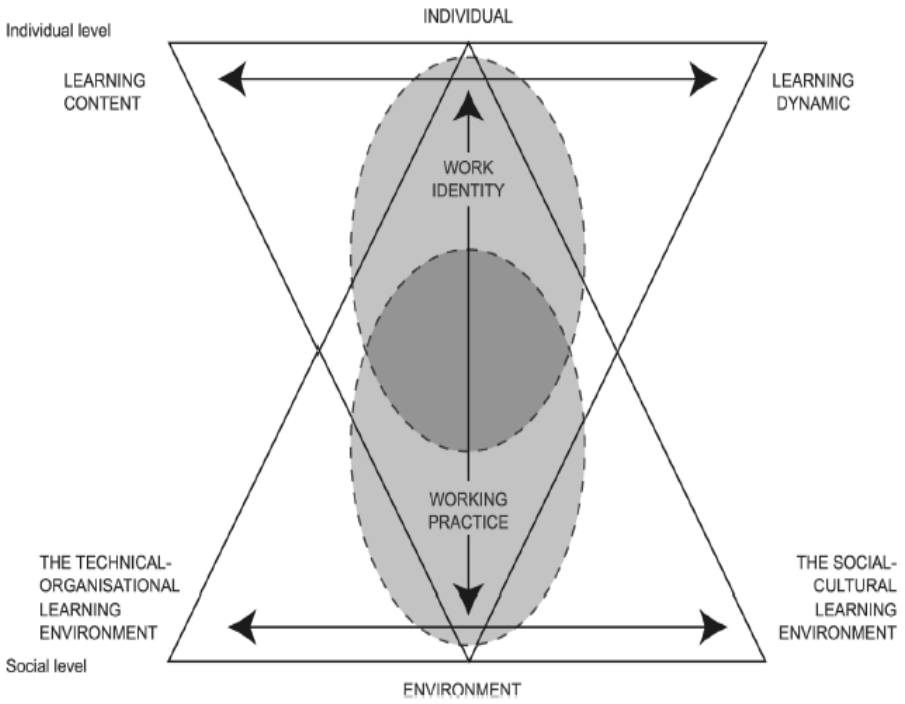


Figure 1. Workplace Learning, from Illeris (2004)

Billet (2011) emphasizes that individual and social construction of learning is interdependent, and notes that "the processes of negotiation between the social and personal contributions are relational, and premised on social suggestion and individuals' construal and construction" (p. 61).

The dynamics of transfer

The literature of transfer suggests that learning processes involved in transfer in museum and other settings can be straightforward or complex, depending upon a range of factors. A key determinant of the complexity of the process however is the degree of similarity between what is learned and the setting or task to which it is applied. As Eraut (2004) notes, transfer "may be short and easy if the new situation is similar to some of those previously encountered; but long and very challenging if the new situation is complex and unfamiliar" (p. 212). Regardless of the complexity of the process, he suggests that the transfer process encountered by most professionals involves five interrelated steps:

- The extraction of potentially relevant knowledge from the context(s) of its acquisition and previous use.
- Understanding the new situation, a process that often depends on informal learning.

- Recognizing what knowledge and skills are relevant.
- Transforming them to fit the new situation.
- Integrating them with other knowledge and skills in order to think/act/communicate in the new situation (p. 212).

Szulanski (1996) adds routinization to this listing, and Yelon (2004) emphasizes the importance of sustained use to complete the process of transfer. As well, transfer is seen to depend upon how well new concepts are understood (Tuomi-Grohn et al., 2003) and how relevant they are to the workplace (Axtell et al., 1997). As a learning process, transfer is influenced by the individual's store of prior knowledge, to the degree that Daley (2001), in her study of transfer in four professions, observes that professionals do not "see transfer of learning as an outcome of their educational endeavours; they [view] transfer as an integral part of the meaning-making process" in which "incorporating new knowledge is a recursive, transforming process rather than a simple straightforward transfer of information from one context to another" (p. 50).

Spatial and time-based descriptors are commonly used in the literature to convey the likelihood that new learning will make a meaningful transition. While these descriptors do not explicitly describe transfer as a learning process in and of itself in keeping with Eraut's definition, they do suggest that the challenges inherent in transfer vary according to the nature of learning relative to both the capacity and motivation for transfer of the learner and affordances for transfer in the working environment. 'Near' transfer, also referred to as low, proximal, or automatic (Haskell, 2001; Leberman et al., 2006), for example, denotes transfer between similar tasks and is considered to be straightforward because this process does not challenge the learner to significantly adapt content. An example in the museum world might be the learning and subsequent application of standardized artefact registration techniques, or the recognition of appropriate times to don white gloves. 'Far' transfer, also referred to as high-road, distal, or mindful transfer in the sources noted above, denotes transfer among dissimilar tasks and is considered to be more challenging since it involves learning to adapt content to situated needs. For example, integrating concepts of community engagement and shared authority across multiple functional areas might involve far transfer in the museum world.

'Breadth' of transfer refers to the application of new concepts or practices across a broad context as opposed to a single task. The use of meta-cognitive, critical thinking, and communication skills might all fall into this category (Marini & Genereux, 1995). The application

of computer technologies to multiple tasks in the museum world might also be seen as broad transfer. 'Vertical' transfer relates to learning that builds on prerequisite knowledge and skills defined in a hierarchy of expertise, while 'horizontal' or lateral transfer focuses on the movement of knowledge across similar levels in a hierarchy (Haskell, 2001). An example of horizontal transfer might be the application of relevant principles involved in the conservation of wood to a different cellulose material such as paper or fabric. 'Backward-reaching' transfer indicates that a person draws on previous experience in a new situation, and 'forward-reaching' transfer anticipates that knowledge will be applied in the future (Eraut & Hirsch, 2007).

These descriptors offer useful ways of understanding and describing museum case participants' experiences and challenges as they learn to apply their learning. This descriptive process is, however, an imprecise and subjective one. Haskell (2001) notes that "there is no simple way to determine quantitatively how similar something 'X' is to another something 'Y'. This is after all the very problem of transfer: what do we mean when we say something is similar to something or is like something else?" (p. 30). He also stresses that the nature of the knowledge base influences whether transfer is near or far—or somewhere in between.

Distinctive museum characteristics that impact transfer

While Eraut's definition is useful in capturing the social, relational, situated and adaptive nature of museum-based transfer as a learning process, a meaningful framework of transfer concepts to guide research in this study must be responsive to the distinctive nature of museum practice. As Lobato (2006) notes, "the growing maturity of the [transfer] field makes it necessary for researchers to clarify the phenomenon that they are investigating and provide a rationale for how the particular transfer definition and approach that is utilized fits the object of investigation" (p. 438). While it seems reasonable to think that museums—and the people who work in museum professional practice—will have much in common with other occupations in their experience of transfer, it is important to also recognize that they have distinguishing qualities that are likely to shape transfer processes in particular ways. A commonly referenced definition of *museum* is offered by the International Council of Museums:

> A museum is a non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of education, study and enjoyment. (ICOM, 2007, np)

This brief definition captures the notions of not-for-profit status, service, stewardship and public education that define the nature of museums around the world. More evocative descriptions also inform my view of the distinctive qualities of museums. The Institute for Museum and Library Services (2009) in the United States emphasizes both the qualities of museum expertise and the ways in which collections benefit society:

> Museums...offer rich and authentic content, dedicated and knowledgeable staff with deep expertise, and safe, trusted settings for individuals and families, all of which invite and support effective learning. The collections...—books, artwork, scientific specimens, and other cultural artefacts—connect people to the full spectrum of human experience: culture, science, history, and art. By preserving and conserving our material and digital artefacts...museums link us with humankind's history. These institutions operate as places of social inclusion that promote curiosity, learning by doing, and discovery. In them, we learn about ourselves and others, and enhance the skills that contribute to empathy, tolerance, and understanding. (np)

And Roberts (1997) observes that museums' purpose and relations are in flux:

> Museums are no longer object-based institutions in the traditional sense of the term—except insofar as objects serve to as conveyers of ulterior ideas and expectations. Rather, they are idea-, experience-, and narrative-based institutions—forums for the negotiation and renegotiation of meaning." p. 147

Collectively, these reflections emphasize that museums can play critical social roles through their unique commitment to conserving and sharing cultural heritage, and offer inspiring environments for meaningful and specialized work. A starting point in refining a guiding framework for data collection and analysis from the general transfer literature in this study was therefore to consider characteristics that seemed likely to distinctively influence transfer phenomena in museums. In designing this study, my experience in the museum world and my review of the literature suggests that the particular nature of professionalism in the sector, its commitment to stewardship, and the degree to which professionals exercise autonomy and initiative in their work will play influential roles in transfer dynamics.

Stewardship orientation

Museums in this study are not-for-profit organizations or government agencies, and their purpose and scope are defined by the nature of the cultural resources they protect and present, by the audiences they serve, and by their governance models. While their primary organizational performance measures relate to stewardship and public education, they are also grappling with calls for greater relevance and accountability. At the same time, they face

increasing pressures to generate earned revenues through a range of activities to sustain their public service roles. This creates a degree of internal tension and a climate of change as the sector and individual museums seek ways to further strengthen both entrepreneurial and socially engaged practices. A bottom-line commitment to service outcomes, as opposed to financial outcomes, however means that museums differ in significant ways from organizations that have profit as a core measure. Research on transfer in the museum sector should be attentive to the ways in which a stewardship orientation impacts conditions for transfer.

Professionalism

Museum practice is seen to be professional in the sense that it involves a commitment to public service; it is supported by international, national and regional associations that deal with and regulate sectoral concerns; it is grounded in bodies of knowledge and best practices that have been articulated for its full range of occupational specializations, and it is guided by standards of practice and codes of ethical conduct (Boylan, 2001; Kavanagh, 1994; Tran & King, 2007; Weil, 1988). However, unlike such professions as medicine, law or teaching, the museum sector has very uneven accreditation systems to guide hiring practices, and expectations of educational preparation for practice vary widely across the sector[3]. Accordingly, the museum sector holds an ideological commitment to professionalism rather than one that is rigourously mandated and regulated. The degree to which museum workers consider themselves professional and commit to ongoing professional development and best practices, as well as the degree to which institutions regard themselves as participants in a professional community, are seen to have some bearing on individual and organizational commitment to learning and transfer (Eraut, 2004). In light of the sector's ideological commitment to professionalism, attention to the influence of professionalism on the transfer of knowledge and skills is of value.

Autonomy and Initiative

Participants in this study are adults at differing developmental stages who work in varied curatorial, educational and management specializations within diverse museums, and

[3] While individual accreditation systems were explored in Canada in the 1980s, the only specialized museum workers that have pursued personal accreditation are conservators and conservation scientists through the Canadian Association of Professional Conservators. More typically, national and regional associations accredit museums, thereby creating an expectation that their staff will have appropriate knowledge and skills to achieve and maintain accredited status. Such systems exist, for example, in Ontario and Alberta in Canada, in Great Britain, and in the United States where 779 or 4% (AAM, 2010) of the 17,500 American museums have sought accredited status.

base their practice on established standards and best practices and on considerable prior education and situated experience. As professionals, their work tends to involve variable 'open' skills or tasks (Yelon & Ford, 1999) that may not be closely supervised. They therefore tend to exercise considerable autonomous judgment in day-to-day practice, within the context of overall procedural and strategic directions set by the organization. While autonomy is considered to be a hallmark of professionalism, the potential for conflict with organizational expectations exists. To balance individual autonomy with organizational authority, codes of conduct articulated by museum associations affirm that, while museum professionals will normally adhere to organizational policy, the worker cannot be required to suppress professional judgment in order to conform to a management decision (CMA, 1999).

Beyond capacity to exercise positional autonomy for self-directed work, learners' personal autonomy and initiative in seeking CPE also predicted to be important in this study. While decisions made by most CRM graduates to participate in the program may be supported by their museums, surveys reveal that learners themselves tend to exercise primary initiative and control in selecting the program and choosing delivery methods and elective topics (Davis, 2001, 2009b). Since the CRM program is a formal, academic CPE program with a curriculum that reflects generalized standards of practice and addresses emergent issues, it is independent of workplaces, and its learning outcomes are not explicitly linked to situated performance goals. The links between the CRM program and a museum's needs are therefore negotiated between the learner and the workplace, rather than as a three-way initiative with the CRM program in the way that a museum-based training program might be. And as learners consider the relevance of conceptual and procedural knowledge and complex strategic skill sets that underlie practice, they may grapple with philosophical and practical issues, depending upon the degree to which new, at times controversial, practices are aligned with personal, professional and organizational values and capacity.

As adults, it is likely that they are also reflexive in both learning and transfer processes (Leberman et al., 2006). Transfer theories that provide an explanatory framework for the particular influence of adult and career developmental stages, linked with autonomy, initiative and self-direction in workplace settings, are therefore important in this study. Learning transfer research that recognizes adult learners' autonomous roles in initiating learning and relating it to practice is clearly of value.

These distinctive characteristics call for an explanatory approach to transfer that is relevant in situations in which experienced professionals seek to apply learning from external and personally-initiated professional development to their somewhat autonomous practice within service-oriented museums where social outcomes rather than profit are key performance measures. While various cognitive and organizational models of transfer contribute valuable and often complementary insights in this study, the models that offer the greatest explanatory power are conceptualized from socio-cultural perspectives. These are grounded in an ontological stance that is aligned with the interpretive orientation of this study and that provides a sympathetic investigatory framework for museum learning transfer phenomena. Socio-cultural explanations of transfer emphasize that:

- Learning and transfer are dynamic, complex and developmental social processes that take place within the context of a recursive and mutually constitutive relationship between the learner and the workplace system (Beach, 1999; Daley, 2001; Hatano & Greeno, 1999; Parent et al., 2007; Stevenson, 2002).
- Knowledge, skills and attitudes for professional practice are subjectively constructed in the classroom environment from among multiple, competing ideas. The learner contextualizes new knowledge in terms of social and cultural subjectivities and prior personal and professional experience (Billett, 1996; Carraher & Schliemann, 2002; Greeno et al., 1996).

These principles are salient regardless of the nature of content and workplace requirements and they create a foundation for the exploration of the research questions. These concepts are elaborated in Chapter 2, along with the transfer factors and themes that provide a guiding framework for data collection, analysis and interpretation.

Dissertation Structure

This study uses a traditional approach in establishing conceptual foundations, discussing methodology and procedures, describing transfer experiences and themes in case settings, and comparing and analyzing outcomes. Subsequent chapters include:

- **Chapter 2 Relevant Literatures and Themes**: As diverse and extensive literatures describe a wide range of complex and interdependent transfer factors in museum settings, Chapter 2 offers both a critique of available literatures and a discussion of factors that are seen to be influential, with particular attention to those associated

with workplace conditions and individual agency. This chapter establishes the conceptual context for this investigation of transfer in the museum sector.

- **Chapter 3 Methodology and Procedures**: Building on the conceptual and thematic foundation set out in Chapter 2, Chapter 3 describes how my case studies were designed to elicit information that highlights transfer dynamics in four different museum case settings.
- **Chapter 4 Case Descriptions**: This chapter highlights the distinctive nature of each of the four case settings and presents key transfer dynamics and factors as it focuses on the first research question, "What are the experiences of museum professionals as they seek to apply concepts, principles and skills that they have gained through continuing professional education?"
- **Chapter 5 Case Comparisons**: Chapter 5 takes a comparative approach in examining ways in which the four case settings contribute to understanding of how conditions in the workplace shape transfer experiences, and how personal agency influences museum professionals' inclination to put new learning to work. This chapter explores the two research questions: "How do conditions in the workplace shape these experiences?" and "How does personal agency influence museum professionals' inclination to put new learning to work?"
- **Chapter 6 Discussion and Implications**: The final chapter reflects on key findings, the limitations of the study, and its implications for learners, museums, the sector, educators, and learning transfer theorists.

Study Challenges

While a qualitative approach to this enquiry provided a rewarding opportunity to explore the lived experience of learners after their participation in the Cultural Resource Management Program, it has been necessary to be attentive throughout the study to challenges that are linked to the inherent subjectivity of this approach.

A notable challenge at every turn was to reconcile the discussion of transfer within the broader context of learning associated with museum practice. As noted earlier, the two are inextricable. In defining terms, it should be emphasized that *learning* in this study describes the selected and personally constructed knowledge, information, skills and attitudes that learners construe and construct from their continuing professional education and then adapt over time

for use—or that they retrieve from resource materials post-course on an as needed basis. As the focus is on professionals, it is also assumed that learning is strongly influenced by prior knowledge and experience and shaped by needs and interests in the workplace. Given that both the process and outcomes of learning differ for each person, depending upon their abilities and motivations for learning, their social relations, and their view of the relevance of the content to their needs, this study does not attempt to assess the nature, scope or quality of learning that results from the CRM program, so much as to explore what learners were able to *do* with learning as they leave the classroom. In this context it is not assumed that all content is universally applicable: only those elements that are of value within the learner's socially and subjectively constructed workplace and professional environments tend to be meaningful.

It is also recognized that distinguishing intentional learning that takes place in the classroom from the ongoing and multi-faceted learning that takes place through learners' work and life experiences—or that takes place in the transfer process itself—is challenging, perhaps impossible, as elapsed time blurs boundaries and recall. As Field (2005) notes, efforts to demark formal from informal learning are "doomed to fail, given the all-encompassing nature of learning as a process" (p. 3). Learners' own subjective perceptions of the learning they gained through the CRM program are taken here as the starting point for discussions of transfer experiences.

Beyond new learning for professional practice, participation in continuing professional education may shift the learner's sense of personal agency in approaching their practice. Shifts in confidence, motivation, vision and goals that result from the learning process will all have subtle and pervasive influences on ways in which the learner approaches the application of learning in the short and long term—and on their recall of experiences.

Another challenge is the unevenness of empirical evidence in various domains of transfer theorizing. A number of observers note the preponderance of theory over empirical evidence (Carliner et al., 2006; De Corte, 1999) across all lines of transfer enquiry. The review of the literature from different domains, described in Chapter 2, indicates that while there is much speculation as to how learning transfer occurs, the nature and quality of studies designed to bring evidence to the discussion vary widely. The lack of comprehensive or compelling empirical explanations for learning transfer within and across various factors suggests that understanding of this phenomenon continues to be fragmented—and highlights the importance of further investigations to support both individual and organizational understanding and decision-making around learning strategies and investments in continuing professional education.

Nevertheless, the need to compress the wealth of theory, concepts and practice that comprise the discourses of workplace learning and museum professional education is another challenge in this study. In highlighting only the core ideas in each of these areas, detailed explanations, nuanced meanings and potential relationships across the two discourses are left aside in favour of a brief and conceptual view of how museum discourse is positioned within the workplace learning discourse to inform this research project. Another limitation is that rich resources from the discourses of knowledge, adult education, and case study methodology can be only briefly referenced.

In seeking to create thematic categories of transfer factors that help organize data collection and analysis, there is also a danger of taking a reductionist approach that simplifies complex phenomena (Hodkinson & Hodkinson, 2004). To counter this, it has been vital to focus on the interdependent nature of factors within and across thematic categories to suggest how they interact to influence both learners' agency and museum workplace conditions for transfer.

Yet another challenge is my own subjectivity. This study focuses on graduates of a program that I have managed at the University of Victoria for almost thirty years. My experience and first-hand involvement with participants in this study has both strengths and weaknesses. On one hand, my deep knowledge of the program, its content, its participants and the museum sector lend authenticity and perspective to study planning, analysis and interpretation. While I have not been acquainted with study participants on a personal basis, my role as academic advisor throughout their involvement in CRM has built collegial relationships and trust that supports our interactions. On the other hand, I have an obvious bias toward presenting the program in a positive light. However, since this study does not seek to evaluate the CRM program, my bias should not be considered significant in interpretations of learners' experiences as they apply their learning in workplace settings. Nevertheless, I have been careful to not introduce materials that unduly favour the program. Where students remark on their learning experiences, the positive and critical comments they offer are unsolicited.

Variation in the use of language in the literature, by case participants, and in my writing, also poses challenges. While English is the dominant language in this discourse, both the meanings and use of words associated with concepts of transfer vary according to the theoretical domain, making a coherent overview of transfer elusive. While I suggest definitions for many concepts and terms encountered throughout this study in the Research Protocol included as Appendix B, quotes extracted from both readings and interviews may feature subtle,

even notable, differences from the ways in which I interpret and use language. For example, when a learner comments that she has mastered a curatorial concept, her understanding of her level of competence may differ from ways in which mastery is defined in the literature (e.g., Dreyfus & Dreyfus, 2005), or from best practices described in museum competency statements (e.g., CMA, 1995b). While I have endeavoured to reconcile such differences as I present and interpret concepts and data, this is a value-laden and imprecise process.

At the same time, in bringing together two previously unrelated discourses, this dissertation devotes considerable attention to discussions of concepts and practices which readers from one discourse or the other might not necessarily be familiar with, and to isolating transfer dynamics that seem of particular relevance to the museum world. Working within these discourses contributes to the length and explanatory emphasis in Chapter 2 in particular.

Cultural Resource Management Program

As the primary case participants are graduates of the Cultural Resource Management (CRM) program at the University of Victoria, a brief reflection on qualities of this program that are likely to contribute to transfer is salient. Unlike many museum studies offerings, this program was designed from its inception to serve participants who are already professionally employed. This approach was grounded on the findings of a survey (Segger, 1976, 1981) that indicated that many of those employed in Canada's museum sector and beyond had never had the opportunity to study the principles and practices inherent in their work with museums, heritage sites and other cultural heritage agencies. A combination of on-campus intensive and distance education courses has been developed to enable people working in a range of cultural heritage settings to participate while also balancing professional and personal commitments. Admission to the program normally requires the completion of an undergraduate degree in a related discipline, although this requirement can be waived if academic advisors are confident that an applicant with related experience can be successful. In most cases, learners initiate participation and the program has little interaction with the employer to discuss the learning that is involved or the supports that a learner would require to be successful in the program.

The CRM curriculum is unusual in that it addresses and at times integrates both museum studies and heritage conservation content. This content has been grounded in curricula articulated by professional associations, although it is not systematically reviewed to ensure alignment. Nevertheless, because the program seeks to address both best practices and

emergent issues, it is known for its quality and innovation. The need to market each course on its individual merits also keeps us focussed on timely and relevant content. Participants are normally required to complete core requirements in both museum studies and heritage conservation, but can select from over twenty electives that enable them to specialize in one area or the other. There are sufficient electives on the museum side of the program that a participant could further specialize in collections management and curatorship topics rather than pursuing more general studies of all key museum functions. A total of 12 one-term courses (480 instructional hours), including a two-term directed study or internship, are required for completion. Most participants take three to five years to complete on a part-time basis.

Instructors in the program are all drawn from professional practice and are selected on the basis of academic background, professional accomplishments, and capacity to communicate their expertise. Program staff work closely with instructors in the design and delivery of coursework since many do not have prior teaching experience. Generally speaking our experience in working with such instructors has been very positive since they bring theory, experience and a high level of enthusiasm to teaching and interacting with learners.

A number of instructional strategies, grounded in the principles of adult and continuing education—as opposed to an explicit commitment to transfer—are regularly utilized to relate content to practice. For on-campus intensive courses, participants receive readings several weeks prior to the on-campus course start date and are required to complete a preparatory assignment that normally involves a reflection on workplace issues associated with the content. In-class assignments are often linked back to workplace dynamics, and students are normally provided with opportunities to reflect on practical issues within their workplace through in-class discussions and activities. Similar strategies are utilized in distance education courses that take place over 13-week terms and the major assignment in these courses tends to encourage the learner to address a work-based problem. For example, learners critique a collections policy in the *Collections Management* course, or profile their community in the *Building Community Relationships* course. This approach is deliberately integrated to strengthen the relevance of these courses to practice.

A final requirement in each learner's program is the completion of a directed study that integrates learning from various courses. While the focus of this capstone course could be a reflection on theory or on broad issues impacting the sector, most students opt to do a project that relates to a need in the workplace. This is graded in consultation with the learner's

supervisor if possible to obtain a perspective on the degree to which the learner has accurately assessed the characteristics, needs and challenges inherent in the work environment. Students who are not professionally employed can opt for a four-month internship as an alternative.

While the concept or principles of 'teaching for transfer' have never been explicitly discussed in the Cultural Resource Management program, critiquing the program in the context of this study suggests that its emphasis on instructional strategies that link theory and practice, its flexibility and accessibility, attention to emergent issues, and focus on the resolution of work-based problems provide learners with some supports for transfer as they return to the workplace. Responses to a question on course evaluations regarding the likelihood that learners will be make use of course content indicate that 92% of participants over the past ten years expect to apply their learning (Davis, 2009a).

Summary

This introductory chapter highlights the potential benefits of greater attention to transfer dynamics in museum continuing professional education and notes that no studies have been conducted to determine the particular influences of workplace climate or individual agency in the transition of learning from the classroom to the museum workplace. It offers a guiding definition of learning transfer and reflects on core concept and distinctive museum characteristics that shape the study. The challenges inherent in undertaking qualitative research on this topic are noted. This chapter ends with a brief description of the Cultural Resource Management Program at the University of Victoria as the study focuses on graduates of this program and their experiences in making their learning meaningful in museum contexts.

Chapter 2 Relevant Literatures and Themes

My questions about museum professionals' experiences in applying learning from continuing professional education establish the qualitative line of enquiry of this study within the context of two separate but complementary literatures. The discourse of museum studies, including strands relating to the nature of work, professionalism and continuing education, describes the social environment in which learning is adapted and offers insight on domain-specific characteristics and expectations of learning for museum practice. The discourse of learning transfer provides a factor-based explanatory, organizational and analytic framework for exploring learners' efforts, experiences, successes and failures in applying learning from the classroom in museum workplace settings. The two discourses are separate in that the museum literature is silent on learning transfer theory and dynamics, just as the learning transfer literature is largely silent on the particular dynamics of the not-for-profit and museum worlds. Intertwined, these literatures offer new perspectives on ways in which learning for professional practice in the museum sector takes place and can be most meaningful.

Specific sources that address ways in which museum workers develop, adapt and apply knowledge and skills for practice constitute a relatively small component of a larger literature on the roles and specialized functions of museums in society. Sources that offer explanations of learning transfer, on the other hand, are much more extensive and are articulated across multiple disciplinary literatures. Studies and discussions of transfer are found in the discourses of educational psychology, human development, adult and professional education, human resource management and performance development, program evaluation, workplace learning, learning theory, and organizational management. While many explore transfer in abstract terms and are not focussed on the workplace, others take a specific look at ways in which what is learned in the classroom makes its way to workplace settings. A literature review rewarded me with a wealth of theoretical and practical insights on learning and transfer dynamics in diverse situations. They also presented me with the challenge of narrowing and focussing on specific transfer dynamics that are salient to the characteristics and dynamics of the museum world.

This chapter begins with a focus on the methods that I used to review and critically evaluate literatures across multiple disciplines in order to reduce a voluminous range of sources to those that clarify core concepts for this study. This first section discusses ways in which the museum literature attends to learning for professional practice, and then focuses on the more

extensive and complex literatures that explore the movement of learning from educational to applied settings. A second section discusses the ways in which both the museum and transfer literatures address the four categories of factors that are seen as influential in transfer activity. Since this study focuses on workplace conditions and individual agency—and their interdependence—these topics are addressed in greater detail than the nature of the knowledge or the instructional strategies that convey content.

Reviewing the Museum Literature

My efforts to identify core concepts that offer an explanatory framework for learning transfer in the museum world involved an initial review of studies and scholarly writing relating to both museum professional practice and to learning transfer in general. On the museum side, this required an exploration of academic and practical writing, looking for attention to transfer and for discussions of ways in which knowledge and learning are structured to support professional practice in diverse settings.

A search for specific references to transfer in the museum literature yielded only passing comments on the importance of relevant and applicable learning for practice (Blackbourn et al., 2002; Kurylo, 2002; Marty, 2006b; Tran & King, 2007; Turgeon & Dubuc, 2002), as opposed to more detailed discussions on ways to ensure that content is applied. The one exception is a conceptual report that emphasizes the importance of both short and long-term evaluation of entry-level instructional programs to determine if they make a difference to museum performance (Blackbourn et al., 2004). The absence of discussion of transfer in the museum literature suggests that transfer is seen as an assumed outcome of educational activities.

The search for insight on the more general topic of education for museum practice was more productive. This literature, while not voluminous, offers perspectives on the nature of museum work, the evolving knowledge base, alignment of professional norms with practice, opportunities for learning, and the functional and organizational nature of working environments. It is grounded in a handful of journal articles and books that discuss overarching (as opposed to discipline-specific) theory associated with undergraduate and graduate education in museum studies (e.g., MacDonald, 2006; Macleod, 2001; McCarthy & Cobley, 2009; Teather, 1991, 2001; Teather & Carter, 2010) or that describe and critique contemporary approaches to professional education in light of significant change in all aspects of practice (Boylan, 2001b; M. Davies, 2007; Friedman, 1994; N. Fuller, 2005; Holmes, 2006; Marty, 2006a,

2007; D. Stark, 2008; Tlili, 2008; Tran & King, 2007). Commentaries on learning requirements for professional practice also appear as sidebars in more general sources that focus on how museums serve society, perform their functions, and undertake a range of research, exhibition, public programming, public service and entrepreneurial tasks.

Much of the material that reflects on education for professional practice noted above is grounded in the experience of authors or involves theorizing about best practices in professional education, drawing on the literatures of adult education and human resource development. In a few cases, studies have measured learners' and employers' perspectives on education for museum professional practice (M. Davies, 2007; J. Davis, 2001; Demos, 2003; Eisner & Dobbs, 1986; Ekos, 1988, 1989; Slivac, 1988) but, generally speaking, very little empirical research has been conducted to build understanding of needs and dynamics in museum professional education at either the preparatory or continuing level. Aside from a few critiques (M. Davies, 2007; J. Davis, 2001; Demos, 2003; N. J. Fuller, 2005; Teather, 1991; Teather & Carter, 2010), professional education is presented as a necessary, beneficial and productive requirement for personal and institutional growth. The work-related outcomes of considerable personal and institutional investment in preparatory and continuing professional education, training, conferencing and in-house workshops are rarely critiqued, evaluated or researched.

Coverage

Reviewing and distilling this literature has been salient since it highlights domain-specific characteristics of the museum sector and its workers which tend to influence how learning and transfer take place. Locating museum-related sources that are relevant to this study involved a range of interconnected tasks. As a professional who has worked in museum continuing education for over 28 years, I am familiar with many sources and can pull key references from my bookshelf. As well, systematic searches of online databases, including WorldCat, JStor, Sage (Education), the Smithsonian Institutional Research Information System and Google Scholar, using diverse individual and combined keywords, including *museum* and/or *professional*: *education, development, training, identity, regulation*, revealed a range of pertinent materials, particularly in the journal literature. Reviews of bibliographies of journal articles, monographs, anthologies and other publications, along with surveys of indices of professional journals, also yielded relevant materials. The latter reviews complemented online searches and had the additional benefit of being endorsed within an already evaluated literature.

Coverage was confined to works from the English-speaking world from 1970 to the present, with emphasis on sources published since 1990. This latter date somewhat arbitrarily demarks the beginning of a period of self-reflexivity in the museum sector that has generated considerable critical insight and change. As Starn (2005) notes "a tidal wave of museum studies was just beginning to crest" in the '90s (p. 1). I looked at both academic and practical sources since much of the writing about CPE and museum practice is presented in materials generated by professional associations, educational programs and government studies. Using these criteria, 180 journal articles, monographs, anthologies, and theses were identified as broadly relevant. Omitted in this selection were many books, articles and other materials that relate more generally to the role and specific functions of museums, since they do not make specific reference to learning for professional practice. Given the relatively small number of sources that address my topic, my coverage of relevant museum literature was comprehensive.

This review has been useful to me in narrowing and focussing my reading to look specifically at materials that reference links between learning and professional practice in the museum sector. The specific ways in which these are perceived to shape learning and transfer dynamics for this study are discussed in subsequent sections. At the same time this review illustrates that, in the absence of any attention in the museum literature to ways in which professionals transfer learning from CPE, it is necessary to search more broadly for explanations of how such learning makes a transition to the workplace.

Reviewing Learning Transfer Literatures

My review of literatures pertaining to learning transfer was, necessarily, more wide ranging, particularly as this discourse was unfamiliar to me at the start of my study. Theoreticians, scholars, researchers and practitioners from many disciplinary and occupational settings share a common interest in explaining how knowledge moves from learning to applied settings, and many of them are also focussed on ways to improve transfer dynamics and results to strengthen teaching and organizational capacity. As Fenwick (2008) notes, with so much change in the nature and organization of work, learning for the workplace has become a "lightening rod" attracting attention in diverse sectors (p. 18). Scholars and practitioners also bring a range of overlapping epistemological positions, specialized expertise, and varied theoretical and practical stances to their writing on transfer. The following overview of key disciplinary perspectives in transfer is intended to illustrate the scope and diversity of sources.

Diverse perspectives on transfer

The importance of applied learning has attracted passing attention for millennia. In the first century AD, Seneca noted "non scholae, sed vitae discimusa" (*we learn, not for school, but for life,* as cited in de Corte 1999, p. 555). However, it was not until the start of the twentieth century that behavioural psychologists began exploring ways in which learning transfers. Early experiments by Thorndike and Woodworth contributed to the theory of identical elements that suggests that transfer takes place when knowledge or behaviours gained in one setting are generalized for application in another setting and applied in response to almost identical stimuli (De Corte, 1999).

Cognitive and educational psychologists were also early scholars of transfer and their domains of interest continue to be dominant today. From this stance:

> ...practically all educational and training programs are built upon the fundamental premise that human beings have the ability to transfer what they have learned from one situation to another… The basic psychological problem in the transfer of learning pervades the whole psychology of human training...There is no point to education apart from transfer. (Leberman et al., 2006, p. 2-3, citing Desse, 1958, p. 213)

Psychologists tend to hold a fairly instrumental perspective on the process of transfer, working from the view that transfer normally results from an individual's capacity to create mental representations in the learning process that allow him or her to retrieve and apply knowledge in new settings. Knowledge, in this classic approach, is regarded as objective, rational and universal, and therefore directly transferable as an outcome of effective instruction (De Corte, 1999; Lobato, 2006). It is this group that coined the term 'learning transfer' and feels most comfortable with its literal translation (Beach, 1999; Saljo, 2003). Cognitive researchers have been preoccupied with transfer in schools and focus on the processes whereby individuals achieve increasing expertise through vertical transfer. As this complex discourse focuses on quantitative analyses of psychological phenomena, and tends to ignore social, cultural and organizational factors that might influence transfer, it was of limited value in this study.

Another dominant group in the transfer discourse is scholars whose explanation for learning transfer is grounded in the epistemological position that learning and transfer are highly influenced by the situational contexts in which they take place (e.g., Greeno et al., 1996; Lave & Wenger, 1991). While situated learning researchers tend to cluster in an oppositional stance to cognitive transfer scholars, they are somewhat divided in their own accounts of the degree to which context influences learning and transfer. Many are theorists who focus on

social systems that include schools and workplaces. This discourse offered a range of useful sources that contributed to an understanding of workplace dynamics, although the role of the individual in situated learning processes is not foregrounded (Billett, 2004).

A middle ground between the cognitive and situated camps is occupied by those who pursue constructivist and socio-cultural (Billett, 2004, 2008; Billett et al., 2006; Brown et al., 1989; Engeström & Kerosuo, 2006; Fenwick, 2010; Harteis & Billett, 2008; Rainbird et al., 2004b) explanations of learning transfer. They recognize the influence of situational and social dynamics on individual learning processes and strive to integrate and balance these complex factors. Their explanations for learning transfer were influential in this study as they focus on learning and transfer for and in workplace settings.

Adult educators form a small, separate, but related group. While they draw on cognitive and socio-cultural theory, they tend to pursue their own explanations for ways in which adult learners engage in processes of acquiring and applying knowledge in diverse settings, based on adult learning theory (Knowles, 1980; Knowles et al., 2005b; Knox, 1978, 2000). Explicit attention to transfer in the adult education literature is limited to a handful of authors (e.g., Alexander & Murphy, 1999; Leberman et al., 2006; Merriam & Leahy, 2005), perhaps because adult educators with an interest in transfer undertake research and theorizing within the related domains professional education, organizational learning, and workplace-based learning and transfer (Wiesenberg & Peterson, 2003). Daley (2001) notes that when studies of adult and continuing education focus on learning for professional practice, they tend to "isolate and analyze the individual learner, rather than evaluate that learner within a particular context" (p. 39), and she adds that "despite [the] huge investment in CPE programs, the field of adult education can offer few assurances that the knowledge learned in these programs is linked to the context of professional practice" (p. 40). A meta-analysis of ways in which transfer is addressed in the adult education literature is offered by Merriam and Leahy (2005), and a useful synopsis of ways in which contemporary research in continuing education can be more attentive to learning for professional practice is provided by Webster-Wright (2009). The literature of adult and continuing education is of particular relevance in considering the ways in which adult learners in the CRM program have engaged with the content and made it meaningful.

An emergent and inclusive area of transfer study is occupied by adult educators and others with a specific interest in continuous workplace-based learning, defined as "the acquisition of knowledge, skills and feelings that result in improved individual or collective

adaptation to change in the workplace" (Wiesenberg & Peterson, 2003, p. 1). Those within the workplace learning field who are interested transfer have a very specific concern about how knowledge that is gained in either educational or workplace settings is being applied to practical problems in the workplace as a function of workers' performance (Carliner et al., 2006). Early research has been preoccupied with the difficulties associated with the transfer of knowledge from preparatory education programs to the workplace; this concern has more recently expanded to include transfer from continuing professional education as workers and workplaces recognize the essential role of lifelong learning to maintain competence (Harteis & Billett, 2008).

The literature of learning for and in the workplace offers useful insight because much of the negotiation of meaning of content from CPE takes place in workplace setting and is therefore subject to the same learning dynamics that take place in workplace-based learning. While favouring socio-cultural accounts of transfer, this discourse draws on all theoretical positions including situated cognition in its efforts to better understand the experience of the learner in the context of the workplace and to identify the range of factors that influence transfer. Some within this group focus on classroom-to-workplace transfer dynamics; many are more intrigued by learning and transfer that take place *within* vocational and professional settings; and most are seeking strategies to maximize the benefits of learning for the individual as well as for the workplace. Many scholars and theoreticians in the workplace-based learning transfer discourse come from specific occupational backgrounds ranging from the trades to health services, and are seeking to understand learning and transfer dynamics; others contribute to the discourse as educators interested in supporting learning in the workplace. As noted by Fenwick (2006), workplace learning is "fast becoming a central topic in fields that have little else in common" (p. 187). The 'burgeoning' (Malloch et al., 2011) literature of workplace learning is of particular influence in this study as it tends to see learning as a continuous, adaptive and co-participative process involving both the learner and the workplace. While this literature does not explore learning transfer in museum settings, the prolific works of Billett between 1996 and 2011, as well as Rainbird and Fuller (2004a), Fuller and Unwin (2004, 2011), and Eraut (1985, 1994, 2004, 2009, 2010, 2011; Eraut & Hirsch, 2007), among others, offer valued insights for this study.

Another large group that seems to exist is some isolation from other transfer domains focuses on transfer in organizational settings, often with a heavy emphasis on performance improvement through training and human resource management as a means of strengthening

corporate productivity and competitiveness. “The main goal of training is to provide, obtain and improve the necessary skills in order to help organizations achieve their goals and create competitive advantage by adding value to their key resources—i.e. employees” (Nikandrou et al., 2009, p. 255).This group draws on organizational and management theory for explanations of knowledge flow into and across organizations, and tends to discuss corporate knowledge as a resource. There is a strong emphasis in this discourse on how organizational knowledge resources are created, shared, and managed. Both cognitive and socio-cultural perspectives are present in these views, but are often framed in terms of how to maximize human capital to support operational efficiencies. Much attention in this domain is focussed on the internal flow of knowledge, although there is also some attention to transfer facilitated through professional development and training. Learners tend to be identified as trainees and little attention is paid to personal benefits and motivations for learning and transfer. While this literature offers useful and practical strategies for more effective human resource development strategies, it tends to make assumptions around organizational purpose, resources, organizational controls, and core measures of productivity that are not always a good fit in the museum world.

It is striking that in this domain in particular, the contributions of scholars from other domains are not widely referenced. Holton for example, who has played a lead role in developing a tool for measuring organizational transfer and has written extensively in this area, (Holton, 1996, 2002, 2003, 2005; Holton & Baldwin, 2003a; Holton & Baldwin, 2003b; Holton et al., 2007; Holton et al., 2000; Holton et al., 1997), does not reference the influential studies, theorizing or perspectives of such scholars from the situated, socio-cultural or workplace learning worlds as Billet, Eraut, Fenwick or others. An example of parallel discourses can be seen in Sié’s and Yakhlef’s interesting 2009 article on the role of passion in facilitating transfer in the petrol industry. They comment that “we were surprised to learn that…transferring knowledge is a process of learning” (p. 181), despite Eraut’s influential contention in 1994 that transfer is inherently a learning process in workplace and professional settings. Another example is Awoniyi et al.’s (2002) exploration of the ways that person-environment fit impact transfer which does not reference very similar findings in Billet’s extensive work on the interdependence of agency and workplace climate (e.g., 1996, 1998). At the same time, scholars in socio-cultural and workplace learning worlds do not tend to reference the works of organizational scholars, although many parallels exist in the discussion of content, teaching, individual or organizational factors that contribute to the likelihood of transfer.

The emergence of the knowledge society and economy suggests that these domains of interest in learning and knowledge transfer will continue to expand, to debate, and to borrow from one another as concern about the flow and application of knowledge grows and as accounts of transfer become more nuanced and sophisticated. However given the diversity of these interests, I note three cautions in working with the transfer literature. The range of theoretical stances creates conceptual challenges. Varied conceptions of transfer, including 'consequential transitions' (Beach, 1999), 'productivity' (Hatano & Greeno, 1999), 'situated generalization' (Carraher & Schliemann, 2002), 'transition among activity systems' (Guile & Young, 2003), 'knowledge diffusion'(Thompson et al., 2006), 'knowledge translation' (Graham et al., 2006) and 'systems-based dynamic knowledge transfer' (Parent et al., 2007), are proposed by various theorists who seek to account for the complexities inherent in the movement of socially constructed knowledge. The presence of such diverse, often overlapping, perspectives offers a rich but challenging range of concepts to navigate.

A second factor that complicates an overview of learning transfer concepts is the range of contexts in which learning and transfer processes tend to be discussed. Classic theories and related empirical studies that explore behavioural and cognitive processes tend to focus on young and adolescent learners seeking to improve levels of expertise through vertical transfer in controlled school and university settings. Conversely, situative theories and studies tend to focus on mature learners in workplace and community settings who are seeking to increase expertise and to resolve practical problems in multiple contexts through horizontal transfer (Tuomi-Grohn et al., 2003). Many of these take place in vocational and business settings, as opposed to more autonomous professional settings, although results are generalized across workplaces. Developmental changes among learners, varying levels of prior knowledge and experience, and diverse circumstances for the application of knowledge across these settings make it challenging to offer meaningful comparisons across theoretical positions, particularly since some authors neglect to specify whether they are discussing youth, adolescents, emergent professionals or mid-career professionals in their theorizing or studies.

A third concern is the unevenness of research in various domains and factors associated with learning transfer. A number of observers note the preponderance of theory over empirical evidence (Carliner et al., 2006; De Corte, 1999) across all lines of enquiry. My review of the literature suggests that while there is much speculation as to how learning transfer occurs, the nature and quality of studies designed to bring evidence to the discussion vary widely and are

focussed on aspects of transfer rather than on a holistic understanding of complex and interdependent processes. The lack of comprehensive or compelling empirical explanations for transfer suggests that understanding of this phenomenon is fragmented—and highlights the importance of further investigations to support both individual and organizational understanding and decision-making around learning strategies and investments in CPE.

Coverage

With such a range of learning transfer sources to examine in order to distil core concepts for this study, the initial review of related literatures involved surveys that were largely undertaken through key word searches on online databases, including WorldCat, JStor, Sage (Education), and Google Scholar. Variants of the terms *learning transfer, knowledge transfer, applied learning, workplace learning, learning theory* and *learning for professional practice* were used for initial searches. As more refined themes that seemed relevant to my study emerged, further searches on such items as *individual agency* and *workplace affordances* were also useful in revealing increasingly specialized sources. As with the review of the museum literature, reviews of bibliographies of journal articles, monographs, anthologies and other publications along with surveys of the indices of professional journals revealed additional relevant materials.

In all, over 500 works were identified and briefly reviewed for their potential relevance to learning transfer. It is interesting to note that many begin with a two-point rationale for studying learning transfer: (1) that transfer is a pressing issue associated with return on training investment given the strategic importance of learning and continuous improvement, and (2) the generally dismal transfer rate reported through research (e.g., Awoniyi et al., 2002; Axtell et al., 1997; Baldwin & Ford, 1988; Daffron et al., 2007; Detterman & Sternberg, 1996; Hutchins, 2009; Leberman et al., 2006; Ledford, 2007; Merriam & Leahy, 2005; Nijman et al., 2006; Nikandrou et al., 2009; Velada & Caetano, 2007).

Many sources from diverse disciplinary stances were valuable in building my understanding of learning transfer dynamics in general. More detailed coverage, however, focussed on those segments of the literature that study and discuss the transfer of learning from educational to workplace settings in particular, or that focus on specific factors that are seen as influential in this process. These sources tend to emerge from the discourses associated with situated cognition, adult and continuing education, workplace learning, organizational development, and human resource development and performance improvement. I avoided

studies that dealt exclusively with cognitive theories of transfer as they tend to explore transfer dynamics of individuals within school systems and as I lack the academic background to evaluate their relevance. While I have favoured socio-cultural perspectives, particularly as they illuminate the experience of the individual in social workplace settings, I also drew on more instrumental views of transfer if they were helpful in contributing insight to processes.

To organize these materials, I entered citations in Endnote which allowed for themed keyword searches. A more detailed review of these materials, undertaken through examinations of the abstract or the text, allowed me to narrow and focus my reading on themes that emerged as influential in transfer activity, with particular attention to factors associated with agency and workplace climate. Of over 500 references that I consulted with reference to learning transfer, the following featured keywords that highlight a particular focus:

- affordances: 58
- agency: 80
- continuing education: 51
- nature of knowledge: 52
- organizational dynamics: 74
- professional practice: 29
- teaching for transfer: 51
- transfer factors: 64
- workplace learning: 109

While there is considerable overlap among these categories as references address multiple subjects, this brief listing of keywords highlights the value of the workplace learning and organizational literatures in this study. It also illustrates that multiple references offer perspectives on the specific factors associated with agency and affordances for transfer. My review also included a range of related references that did not focus on transfer but contributed perspectives in such areas as the role and evaluation of education or that discussed organizational dynamics.

My keyworded entries in Endnote also highlighted that scholarly work associated with learning transfer represents both theoretical and empirical perspectives:

- literature reviews and meta-analyses: 24

- empirical studies: 210, including 34 PhD and EdD dissertations. Many of these involve quantitative analyses of changes in aspects of behaviour and/or dispositional qualities after a wide variety of learning events in varied occupational settings.
- theorization and critiques associated with learning and transfer: 200+

The balance of references included procedural guidelines for teaching for transfer or facilitating transfer, normally in organizational and human resource management literatures, and government reports on the state of learning.

It is important to note that my reviews of the literatures of transfer and museum professional education was a recursive process that took place throughout this broad, inclusive and interdisciplinary project. My initial comprehensive reading in both literatures was an educational but de-contextualized process that strengthened my critical understanding of diverse perspectives on the transfer of learning. Initial reviews critically evaluated a broad literature to gradually reveal a conceptual framework to guide my enquiry and support data collection and thematic analysis. Given the range of interdependent factors that weave together in transfer dynamics, my reviews sought to map the full range of factors relevant to museums rather than to delve deeply into any single one. Once my data were in hand, a second more selective literature review was necessary to further clarify themes that emerged from the case studies and to inform my interpretation. And once a first draft of my dissertation took shape, yet another review of core materials helped to refine and reinforce my capacity to articulate critical points. Each time I revisited readings, I found that core concepts became increasingly meaningful as I considered them in the context of my data and findings. At the same time, this recursive process revealed new meanings in my data. Just as qualitative research and analysis are emergent and subjective processes, so the review of pertinent literatures must be seen, not so much as a foundation for enquiry, but an increasingly meaningful context for interpretation.

A Guiding Framework for Research

As noted, my search for a single broadly accepted theory that explains transfer of learning from CPE to a professional workplace revealed a lack of extensive or conclusive enquiry in this field (Leberman et al., 2006; Merriam & Leahy, 2005; Velada et al., 2007), along with a lack of clarity and convergence on the impacts of key variables. In the absence of a single theoretical framework, guiding propositions that framed this study were drawn from the socio-cultural, socio-cognitive, adult and continuing education, and organizational and workplace

learning domains, and contributed complementary explanations for transfer. The following is a synthesis of commonly expressed propositions that offer insight on the phenomenon of transfer from museum continuing professional education:

- Transfer capacity is essential to competent performance (Alexander & Murphy, 1999).
- Capacity for transfer is influenced by the degree to which the learned knowledge, skills and attitudes are similar to those valued in workplace practices (Eraut, 1994; Haskell, 2001).
- The learner is influenced by complex workplace systems characterized by collective goal-oriented activity mediated by rules, regulations, tools, a division of labour, and the community. Since workplaces are inherently in tension as they balance competing interests and cope with change, they create conditions for learning (Blackler, 1995; Engeström & Kerosuo, 2006; Holton & Baldwin, 2003a; Leberman et al., 2006).
- A range of interdependent factors related to personal and professional agency can enable and motivate the learner to selectively engage in transfer (Greeno et al., 1996; Pea, 1987).
- Workplace climate and affordances are influential in creating co-participative opportunities for the introduction, adaptation and long-term maintenance of learning from external sources (e.g., Beach, 1999; Billett, 1998, 2001; Blackler, 1995; Greeno et al., 1996; Haskell, 2001; Holton, 2005; Leberman et al., 2006; Merriam & Leahy, 2005; Rouiller & Goldstein, 1993; Tuomi-Grohn & Engeström, 2003).

These propositions were consistent with the epistemological foundation for this study that recognized the socially and individually construed and constructed nature of knowledge and emphasized the interdependence of content, instructional strategies, the agency of the learner, and the workplace context in animating transfer. The final two propositions noted above, relating to the interdependent roles of agency and affordances, also offered an integrative guiding framework for exploring transfer dynamics in each museum case study.

The notion of influential factors is commonly used to organize discussions of transfer regardless of disciplinary or epistemological stance (Awoniyi et al., 2002; Baldwin & Ford, 1988; Ford & Weissbein, 1997; Haskell, 2001). While different disciplines focus on varied theories of transfer according to their special interests, they tend to describe the associated variables as

factors that influence how transfer occurs. For example, educational psychologists suggest that an individual's level of motivation to learn and to effect change in the workplace influences the degree to which transfer occurs, while organization theorists emphasize the influence of conditions within the workplace.

Exploring the impacts of diverse factors on transfer in museum settings allowed me to draw on multiple perspectives and findings on transfer, provided a systematic focus for interviews, and offered a theoretically-grounded but flexible structure for thematic analysis of data. From my review of the transfer literature and a range of other efforts to categorize factors (e.g., Alexander & Murphy, 1999; Baldwin & Ford, 1988; Belling et al., 2004; Billett, 2002; Curry et al., 1994; Greeno et al., 1996; Szulanski, 1996; Tasse & Hrimech, 2003), I arrived at a four-part model of content, instructional, workplace and agency factors that offered an inclusive means of recognizing variables that museum workers are likely to deal with as they seek to apply newfound knowledge from continuing education. This factor categorization approach also allowed for a particular focus on the two research questions, *"*how do conditions in the workplace shape these experiences?*"* and "how does personal agency influence museum professionals' inclination to put new learning to work?" while not losing sight of the important roles of content and instructional methods in the overall process. While my focus on agency and workplace climate was stimulated by my interest in learners' experiences in the museums, it is also echoed in the somewhat instrumental findings of a study on museum workforce development that observes that "while there are some problems with the supply-side of training, demand-side problems predominate. Increasing informed demand from both individuals and organizations is an essential part of improving supply" (Demos, 2003, p. 28).

As a basis for designing my data collection and for organizing my thematic analysis, I prepared a conceptual model (*Figure 2*: Four categories of learning transfer factors) to anticipate the range of factors that are seen to individually and interdependently contribute to the capacity of a person to "learn to use previously acquired knowledge/skills/competence/ expertise in a new situation" (Eraut, 2004, p. 212). A primary criterion for including a factor within this thematic model is that it is described in the literature as playing a significant, if variable, role in influencing capacity to transfer learning. This model suggests that a range of variables contribute to the likelihood of sustained transfer. While this format presents a useful synopsis of factors, like any model it is reductive since it does not convey ways in which complex and incompletely understood factors variably influence behaviours of diverse workers and

workplaces. Although factors may be weak or absent or oppositional in different settings, other elements may compensate in order to achieve the end goal of transfer.

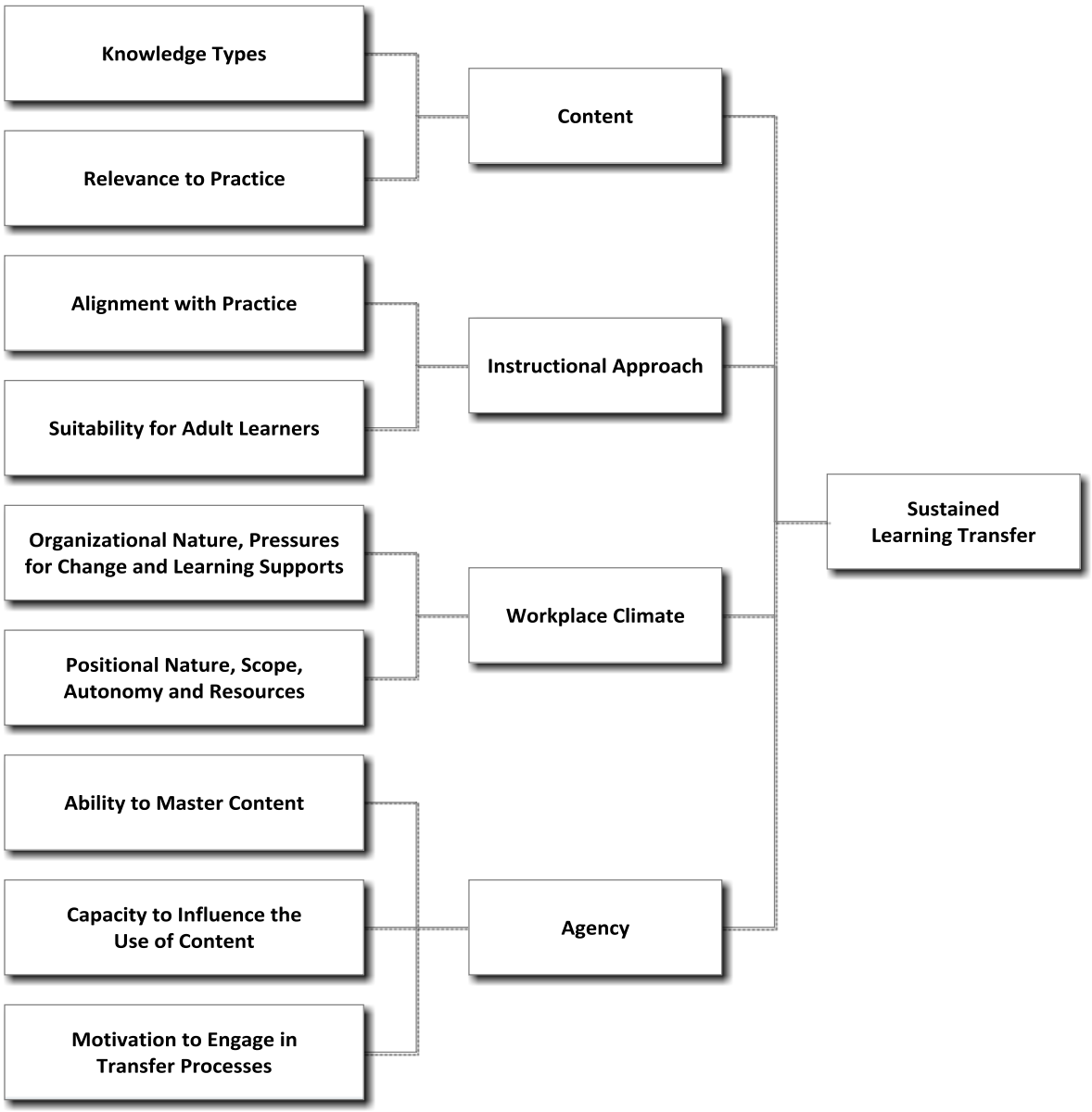


Figure 2. Four categories of learning transfer factors.

The following discussions of content, learning, agency and workplaces highlight the individual and interdependent potential of these factors to influence transfer in the museum world, although as Awoniyi et al. (2002) observe, research outcomes to date on this range of factors "leave us with little knowledge base as to how these many variables relate and their

possible transfer interactions" (p. 26). While the model captures multiple factors that contribute to transfer, the concern in this study was not to test causal links among factors since the case method does not support such enquiry. Instead this guiding framework was useful in anticipating themes and patterns that contribute to an understanding of transfer in the museum sector—and through this process, this study also considers the degree to which my qualitative evidence aligns with multiple theoretical propositions inherent in this framework.

Relevant Concepts and Transfer Factors

The balance of this chapter explores the nature and roles of categories of factors in transfer processes. Discussion of content and instructional factors is briefer than subsequent discussion of workplace conditions and agency, since the nature of museological knowledge and instructional design are not primary focuses in my research. Given that each of the many factors that comprise all four categories is grounded in a rich and complex theoretical and practical background, this discussion selectively addresses those concepts that seem to be of particular value in understanding transfer experiences in the museum sector. In most instances, it draws on literatures that focus on topic associated with learning transfer, as opposed to the broader literatures that address human and organizational behaviours.

Even within learning transfer literatures, there is little consistency in how scholars approach studies of transfer factors. On one hand, Subedi (2004), for example, suggests that "researchers…have often researched effects of factors in isolation, and in fact, in contexts of modern workplaces of the western cultures" (p. 598). On the other hand, across multiple domains, some theorists assemble and categorize these factors into groupings, such as those associated with motivation, or organizational culture, rather than considering them in isolation from one another—and they suggest that these factors work in interdependent ways to determine the likelihood of transfer. The transfer discourse, from a workplace learning perspective, involves many overlapping discussions of the interplay of various kinds of individual and contextual phenomena.

What kinds of knowledge do museum professionals work with?

Although this study does not focus on knowledge involved in museum practice *per se*, an understanding of characteristics of the content addressed through CPE and applied within practice is important in analyzing transfer dynamics. This section briefly explores core concepts

relating to knowledge and content that are seen to be influential as learners put learning to work. Knowledge is defined broadly here as the socially and personally constructed range of concepts, skills, procedures and practices that inform and guide museum work. The term 'content' denotes types of knowledge that tend to be conveyed through formal educational activities. In distinguishing content from knowledge, I recognize that some forms of knowledge can be dealt with in instructional settings, while others are less likely to be developed in this manner. This section begins with an overview of the scope of knowledge utilized in museum practice, and goes on to briefly discuss types and qualities of knowledge and how these contribute to an understanding of transfer of content in the museum world.

Evolving knowledge for museum professional practice

With over a century of experience in developing and managing public museums, the museum workforce has become segmented into a range of functional specializations, including conservation, curatorship, collections management, programming, and organizational leadership, each with distinct knowledge requirements. Most contemporary museums supplement these traditional roles with new specializations in information management, audience development, marketing, and financial development. As Boylan (2006) points out, it is now possible to identify over sixty distinctive museum jobs, many of which emphasize management functions.

Concurrent shifts in museum theory and more integrative and interdisciplinary approaches to practice have reconfigured the nature and type of knowledge requirements as well, releasing at least some of them from what Weil (2002) calls a "disciplinary straightjacket" (p.42). Conservators now emphasize preventive conservation and risk management; curators need collaboration and programming skills for their work with source communities; educators and programmers facilitate visitor experiences; and directors balance leadership and entrepreneurial challenges with inclusion, sustainability, and social responsibility. And emerging technologies and social networking tools are shifting the ways in which all jobs may be approached (Kelly, 2010). Hooper-Greenhill (2001) comments that the changes reshaping the museum world demand "no small modification of existing practice, but a virtually complete reconceptualization of the social purpose and communicative style of the museum as an organisation" (np).

Changing working styles also impact knowledge requirements. Leaner organizations require team-based and situated skills for work. At the same time, the workforce is becoming more mobile. Generic skills in leadership, facilitation, management, media literacy, global awareness, and career management "are no longer simply desirable—they are necessary" (IMLS, 2009, p. 6). In this complex environment in which the list of museum studies skills increases in an "additive" fashion (A. Davis, 2010, p. 3), continuous education to build and sustain professional knowledge is both an imperative and a challenge. Demos (2003) notes that museum workers are "expected to use an extraordinary variety of skills, but with very little available training to support this expectation" (p. 22). This insightful British study goes on to state that "the combination of rising demand for new skills and no decline in demand for traditional skills poses serious questions about the capacity of the sector to sufficiently add to its skill base and meet its anticipated future needs" (p. 23). Despite such concern about capacity, Fuller (2005) observes that, "global forces have affected the skill and knowledge requirements for employees. A look at job requirement notices posted over the past two decades shows a plethora of new and expanded museum positions, reflecting changed perceptions about the needs and expectations of its workforce" (p. 273).

The range of functional and generic knowledge described above is necessary in well-functioning contemporary museums. However, the demands for learning are further complicated as the positions that are designed to operationalize such knowledge vary, depending upon museum size and resources. In small museums with only a handful of staff, the curator is likely to be a generalist, also serving as director and lending a hand to visitor activities. In large museums each functional area may employ multiple specialized staff. Clearly, while staff in small and large museums share similar titles, professional identities, values, and working practices, there is significant variation in their scope and level of specialization, professional and organizational knowledge base, educational needs, and transfer circumstances.

Knowledge types and qualities

While a detailed description of specialist museum knowledge is beyond the scope of this study, understanding the nature of *types* of knowledge is of value since these are seen to transfer in different ways. This discussion is necessarily brief, given the complexity and diverse ontological and epistemological perspectives inherent in the study of knowledge. This overview

offers a typology of content encountered in museum CPE and suggests ways that the nature of content may influence transfer experiences in case settings.

Learners must deal with complex content as they develop professional identity and expertise and relate it to museum settings. The knowledge base that is typically presented in course content addresses domain-specific concepts, theories, data, information, skills, performance processes, values, and norms. To make content meaningful, learners are further challenged to integrate multifaceted, often abstract knowledge with organizational knowledge related to a museum's purpose, structure, routines, social relations, and administrative processes. Combined, professional and organizational knowledge bases present a complex and dynamic mix of principles and practices that learners negotiate in the context of their subjective realities. Since the potential for tension exists as learners encounter difference, even conflict, in values, procedures and desired outcomes between professional identities and work practices (Zakreski, 2003), they must also rely on their own personal knowledge bases to mediate demands. Clearly each learner's knowledge and experience will differ according to their unique mix of circumstances, values and goals.

Scholars take varied approaches to describe knowledge at play in the workplace, although Eraut (1994) considers methodologies for describing professional knowledge "primitive" (p. 102). Classifications of knowledge offered from varied epistemological stances create a conflicting array of typologies, many expressed as dichotomies: objective or subjective; abstract or situated; theoretical or practical; formal or informal; declarative or procedural; practical or formal, or practical, technical or emancipatory (Eraut, 1994; Kakabadse et al., 2003; Morris Baskett & Marsick, 1992). In some cases, typologies also address the degree to which knowledge is situated in the workplace, the ways in which novices and experts access and use it, and the likelihood of transfer. And knowledge should not be confused with the raw facts, measurements and statistics that comprise data, or the information that results when data are organized into meaningful forms. "Knowledge is the result of interpreting information based on one's understanding, it is influenced by the personality of its holder since it is based on judgment and intuition; knowledge incorporates beliefs, attitude and behaviour" (Al-Alawi et al., 2007, p. 24, citing Lee and Yang, 2000). Blackler (1995) also reflects on the subjective nature of knowledge by emphasizing that all knowledge is, to some degree, mediated, situated, provisional, pragmatic and contested—and as such should be understood as a 'way of knowing' as opposed to a fixed entity. As Fenwick (2008) observes, "workplace learning is contested

terrain filled with fundamental tensions related to what knowledge counts most and who says so" (p. 24).

de Jong and Ferguson-Hessler's (1996) categorization offers a framework for discussing transferability of content of CPE. It places both types and qualities of knowledge-in-use in a matrix that offers a parsimonious but inclusive means of describing domain-specific and organizational knowledge relating to task performance. The notion that people work with specific but interdependent *types* of knowledge derived from differing epistemological positions is core to this model.

- **Conceptual knowledge** (also described as theoretical, declarative, canonical, abstract, propositional, disembodied, decontextualized, embrained, formal, disciplined, or 'know what' knowledge) is seen to include the theories, hypotheses, constructs, propositions, opinions, generalizations, classifications, principles, models, structures and understanding of systems that apply to a particular domain or discipline (L. W. Anderson, 2005; Blackler, 1995; de Jong & Ferguson-Hessler, 1996; Eraut, 1994; Schunk, 2004). As such, it represents "our conceptual understanding of phenomena" (Raelin, 2008, p. 68) and provides a "critical perspective when judging the validity of a profession's generalizations and practical principles" (Eraut, 1994, p. 102). Haskell (2001) describes theory as an "efficiency manager" and notes the value of such knowledge in supporting far transfer. "Theoretical knowledge provides us, simultaneously, with (a) a rule to guide our transfer, and (b) a framework to constrain runaway transfer. Theory directs us (consciously or unconsciously) to look in this place and not in that place" (p. 155). He adds that "theoretical knowledge, then, is necessary for creating coherence out of a bunch of novel or otherwise disconnected experiences. In addition, theoretical knowledge is more likely to be transferred to new situations" (pp. 155-156). However, Eraut (1994) cautions that theoretical ideas cannot normally be applied off-the-shelf. "...their implications have to be worked out ...thus the functional relevance of a piece of theoretical knowledge depends less on its presumed validity than on the ability and willingness of people to use it" (p. 43).
- **Procedural knowledge** (also known as practical, concrete, routine, factual, process-oriented, technical, instrumental, sanctioned, embedded or 'know how' knowledge) relates to the actions, methods, and techniques that are valid within a domain or

setting (Blackler, 1995; de Jong & Ferguson-Hessler, 1996). Such knowledge can be drawn from the professional knowledge base to regulate practices, or can be set by the organization to shape and control internal processes. Explicit procedural knowledge addressed in course content can include normative best practices and systems. Procedural knowledge that is unique to the situation to which it applies does not tend to be referenced in detail in CPE content except as it represents explicitly articulated best practices or illustrates practice through case studies. Near transfer can occur when procedural knowledge is clearly aligned with organizational practices. When learned procedures are not relevant or timely within an organizational setting, adaptation or advocacy is required to achieve far transfer of procedural knowledge.

- **Situational knowledge** (also known as practical, informal, technical; encultured, or embodied knowledge) is specific to the work context and includes experience, skills and attitudes shared by colleagues; organizational goals, values and norms; and personal knowledge that includes "everyday knowledge of people and situations, know-how in the form of skills and practices, memories of episodes and events, self-knowledge, attitudes and emotions" (Eraut, 2004, p. 202). Situational knowledge is seen as collective in that it tends to be generated within communities of practice (Guzman & Wilson, 2005; Lave & Wenger, 1991), and emergent, in that it is embodied within peoples' evolving minds and social relations. It is typically tacit and therefore challenging to convey in the classroom. It may be alluded to in CPE content through case studies, instructors' interpretative illustrations of conceptual and procedural knowledge, group discussions that reflect on practice, and/or experiential learning. However, situational knowledge tends to play a marginalized role in the construction of generalized content for CPE due to challenges inherent in transfer.
- **Strategic knowledge** (also known as metacognitive, self-reflexive, 'know when', or 'know why' knowledge) is used by learners to organize their own problem-solving processes, evaluate situations, and formulate plans of action for the use of knowledge (L. W. Anderson, 2005; Schunk, 2004). CPE that builds capacity for critical and reflexive thinking, problem solving, communication, initiative, self-direction, and social and cross-cultural skills, includes strategic knowledge in its content. Such knowledge is seen as vital in self-directed processes of learning to transfer content.

> Edwards (2010), for example, points out that professionals require relational expertise and agency to negotiate multiple viewpoints in the workplace based on "confident engagement with the knowledge that underpins one's practice…as well as a capacity to recognise and respond to what others might offer" (p. 13).

de Jong and Ferguson-Hessler (1996) note that the nature and use of these knowledges are modified by *qualities* that may be relevant across the knowledge types described above. While they focus on a range of qualities[4] that impact problem-solving in the study of physics, I include only tacit or explicit qualities as these seem of particular relevance in this study.

- **Tacit or Explicit:** The degree to which knowledge is codified influences how it is used, its inclusion in content, and its likelihood of transfer. The capacity to encode conceptual and some procedural knowledge positions it to be sanctioned and instrumental in regulating practice with a domain, and generalizable across situations. Viewed from an objective perspective, such knowledge becomes independent of sources and situations, and can be organized and communicated without loss of integrity in various media. Explicit knowledge becomes the canon of a domain and can be "contained and enshrined" in such repositories as libraries and universities (Bentley, 2000, p. 354). As such, explicit knowledge is seen as relatively transferrable (Birkinshaw et al., 2002; Teigland & Wasko, 2009) and tends to comprise much of the content conveyed in educational programs (Eraut, 1994). However, de Jong and Ferguson-Hessler's observation that explicit knowledge can be challenging to translate into task performance highlights the theory/practice divide. In discussing the limited utility of explicit conceptual knowledge in practice, Eraut (1994) states, "if you do describe a scheme purely in terms of propositions, you have probably left something out, and it could be something quite important" (p. 106).

  On the other hand, unencoded or tacit knowledge generated through the norms and procedures of the workplace or gained through personal experience is seen to guide task performance without being officially endorsed (Raelin, 2008). Such knowledge "...becomes embedded in people's minds over time and it is demonstrated through their actions and behaviours" (Al-Alawi et al., 2007, p. 22),

[4] de Jong and Ferguson-Hessler (1996) offer descriptions of non-autonomous and autonomous, superficial and deep, novice to expert and general to domain specific qualities, as well as modality. While these address codification and expertise in oblique ways, I have elected to discuss tacit and explicit qualities since these align most clearly with literatures that reference transfer.

and can be “a potent source of distinctive competitive advantage” (Martin & Salomon, 2003, p. 360). Because tacit knowledge is normally situated and may be difficult to articulate and encode, it is challenging to teach or transfer beyond its immediate social context (Lave & Wenger, 1991; Teigland & Wasko, 2009). Transfer can rely on the credibility of the learner (Kakabadse et al., 2003) as well as the capacity of the receiver to make sense of it. “Tacit knowledge is not easily separable from its human actor and is only meaningful and actionable to those who are already knowledgeable” (Teigland & Wasko, 2009, p. 16). As Sun and Scott (2005) note “explicit knowledge exists at the epistemological dimension where explication is possible using written or coded formats, while tacit knowledge exists at the ontological dimension” (p. 75).

While the tacit/explicit dichotomy is often encountered as a descriptor for knowledge types and their likelihood of transfer, its inclusion as a quality that further defines conceptual, procedural, situated and strategic knowledge types allows for a nuanced understanding of ways in which CPE content is developed and transferred. Kakadabase et al. (2003) cite Polanyi (1966), whose seminal work defined tacit and explicit knowledge, in observing that a “sharp distinction between tacit and explicit knowledge does not exist”, and they reinforce the notion that all knowledge is constructed in saying that “even if knowledge has been articulated into words...this explicit knowledge must rely on being tacitly understood and applied” (p. 86).

Content for museum continuing professional education

The interrelation of these knowledge types and qualities is useful in recognizing the kinds of knowledge addressed in the content of museum CPE and the likelihood that it can be transferred in meaningful ways. Like many emergent professions, museum work is defined by specialized knowledge and skills that are articulated in a growing literature, but that are also embedded in day-to-day practice. Museum studies, literally the study of museums, emerged in the 1960s as an academic framework for researching, articulating, codifying and critiquing evolving museum roles, responsibilities, and functions. Early literatures and programs presented a positivist and Eurocentric view, largely comprised of procedural and some conceptual knowledge, describing organizational, curatorial, collections and exhibition principles and functions. The term ‘museology’ has been used interchangeably with museum studies in this

discourse, although some define it more narrowly as the "quasi-scientific" study of the skills and procedures needed for practice (McCarthy & Cobley, 2009, p. 406). Throughout its history, museum studies has had an uneasy relationship with the diverse museums that it seeks to explore and explain. This is, in part, because conceptual and procedural content is mapped out by arms-length academic and/or professional bodies through curriculum, syllabi and competency standards that validate and privilege codified descriptions of roles, purposes and functions. Eraut (1994), speaking of professions more generally, observes that this approach does not attend to practical requirements for practice in professions. "Not only are large areas of know-how omitted from training, but where there is common knowledge it is structured, labelled and perceived differently. Secondly, where knowledge is outside traditional syllabi, its description is rather imprecise" (p. 42).

Over the past three decades, museum studies as a knowledge base, discipline and curriculum, has moved from a preoccupation with procedural vocational requirements to address more conceptual, philosophical and subjective perspectives on practice. This shift has occurred as the discipline critiques modernist value systems and power relations. While museum scholars have taken a lead role in theorizing museums through a post-modern lens, scholars from such disciplines as philosophy, cultural studies, education, sociology and anthropology also contribute to this discourse out of interest in the influential roles that museum play in society. A 'new' museology blossomed under this scrutiny. Vergo (1989) characterizes this as a state of dissatisfaction with an 'old' museology preoccupied with methods rather than purpose, while Teather (1991) notes that new, more theoretical approaches strengthen the legitimacy of museum studies in academic circles. Advocates for new museology call for more democratic power relations, inclusion, shared authority, accountability, and social responsibility. Anderson (2004) reflects that museums have shifted to a 'reinvented' paradigm, with an accompanying shift in knowledge and skills. For example, she notes that reinvented museums are equitable rather than elitist, socially responsible rather than socially active, community-based rather than accessible, and positioned to share rather than protect knowledge. Anderson's listing highlights the evolving complexities of professional knowledge bases. Keeping pace with change is seen as one of the greatest challenges for professionals. "If museums are to remain vibrant and, more to the point, be influential players in the broad cultural arena, they must possess and integrate, on an on-going basis, new and different philosophical and intellectual understandings into their practical work" (N. J. Fuller, 2005, p.

273). While Fuller calls for change, Starn (2005) reflects that "the dividing line between new and old practices and purposes is far from being sharp and fixed" (p. 2), leaving the learner to navigate a landscape that is "fraught with complex and often conflicting motives" (p. 19).

The relevance, utility—and transferability—of the conceptual and procedural knowledges that comprise evolving museum studies are further complicated by the variety of museum settings noted earlier, their epistemological stances, the degree to which they are engaged with change, and their alignment with professional norms for practice. The Canadian Museums Association definition of a museum alludes to thirteen types of specialized 'museums' (2009c) and within these various categories there are many variants. As most museums and museum workers are not formally accredited, the consistent application of professional norms is a matter of individual and/or organizational discretion. As a result, the balance between the professional and organizational realms of knowledge can vary, impacting the relevance—and transferability—of content in museum studies curricula and provided in CPE programs.

In focusing on how museums are shaped by, and in turn shape, wider social processes, the discourse and content of museum studies has become increasingly theoretical, interdisciplinary and analytical (McCarthy & Cobley, 2009; Starn, 2005; Teather, 2008; Teather & Carter, 2010). Indeed, some reflect that museum studies has become overly theorized to the point it is inaccessible to pragmatic professionals who lack the time or academic background to engage in the discourse. This suggests that transfer of such content could be characterized as 'far' in that it demands considerable reflection and adaptation. The disconnect between the discourse of principles and day-to-day practice is observed by a number of writers (e.g., Demos, 2003; McCarthy & Cobley, 2009; Starn, 2005). As Janes (2009) comments, "it's clear that there is no lack of method, theory, ideas and experience…yet the relationship between museum studies research and the community of practice remains obscure..." (p. 172). Genoways (2006) calls for "the entire museum profession [to] become more scholarly…[and] move from the current word-of-mouth passing of information to an academic approach in which ideas are published, reviewed, criticized, contemplated, revised and restructured, and published again" (p. 231).

The theory/practice dichotomy has been explored by several authors seeking to reconceptualise museum studies in ways that recognize the contributions of practitioners. Teather (1991) is an early voice in describing the "dysfunctional divide" as:

> ... a growing marginalization of museology in both the profession and academe. Substantive museological work is developing but it is missing from the mainstream

> literature of the profession. …there has been an explosion of more theoretical views of the museum emerging from anthropology, sociology and semiotics, many prepared by academics interested in museums but who study them from external perspectives. Practitioners, however, do not access this theoretical body of writing, and if they do they often find it too replete with jargon and rooted in the particular theoretical discipline to make much sense in the context of their own working lives. (p. 404)

Teather (1991) calls for a more integrative approach to museum studies that also provides practitioners with meta-analytic and self-reflective skills that enable them "do the right thing" rather than to "do the thing right" (p. 416) in light of more sophisticated and morally grounded conceptualizations of museum roles and responsibilities. MacLeod (2001) expands this early critique of content that is inattentive to practice, building on Lave and Wenger's (1991) work on communities of practice to suggest that museum studies must be understood as a recursive process of training, education, research and practice. This echoes Eraut's (1994) contention that "professional knowledge cannot be characterized in a manner that is independent of how it is learned and how it is used" (p. 19). Bridging the theory/practice divide involves the development of strategic knowledge to build capacity for reflective participation.

Like MacLeod (2001), Teather and Carter (2010) suggest that museum professionals be encouraged to develop strategic knowledge in order to be "critical thinkers and moral practitioners" (p. 28) who practice socially responsible critical museology by engaging "...in issues [that] range from the politics and ethics of ownership and repatriation to the philosophical and pragmatic challenges of institutional development and operation; from taking part in collaborative and participatory programming to producing critical museum visitors and publics…" (p. 24). Although they recommend integrating experiential components within curriculum to develop such skills among emergent professionals, they recognize but do not explore the challenges inherent in developing strategic knowledge for those already in professional practice and engaged in more situated learning activities. Participating in current discourses and working collaboratively with colleagues to generate new theory are suggestions that they offer, and they assert that "*critical thinking*—dealing with the *why* questions—is part of any professional's ability to take control of their own future" (p. 30, authors' italics).

While Teather and others offer insight on the ways in which diverse knowledges can more effectively inform practice, the extent or impact of this theory/practice divide issue has not been explored through research. As both a receptive organizational environment for principled practice and an individual inclination for critical thinking both seem to be important in

the application of learning, this study considers ways in which case participants experience the theory/practice dichotomy as they seek to apply their learning.

How does continuing professional education support learning transfer?

Teaching that facilitates transfer is critical in supporting the movement of content into practice (Alexander & Murphy, 1999; Merriam & Leahy, 2005). This view attracts significant attention in critiques of transfer because measures of the 'success' of instruction highlight problems. "Although the exact amount of transfer is unknown, the transfer problem is believed to be so pervasive that there is rarely a learning-performance situation in which such a problem does not exist" (Elwood F. Holton et al., 2000, p. 334). At the heart of this concern is a lack of similarity between classroom and workplace that positions transfer as 'far,' and therefore challenging (Billett, 1998). To emphasize the complexities of the learning process involved in far transfer, Eraut (2004) uses the metaphor of an iceberg to suggest that content acquired through professional education, represented by the part of the iceberg that floats about the surface, is publically perceived and validated. The substantial learning required in actual transfer is less visible despite effort needed for additional learning and adaptation. A key point he makes is that the learning processes involved in transfer from academic to workplace settings are largely tacit and unsupported and that the amount of subsequent learning is significantly underestimated.

In an environment in which only 10-40% of the content addressed in professional education is seen to be applied (e.g., Broad, 2005; Eddy & Tannenbaum, 2003; Finley Jr., 2005; Haskell, 2001; Holton, 2002; Merriam & Leahy, 2005; Naquin & Baldwin, 2003; Tasse & Hrimech, 2003), strategies for maximizing the effectiveness—or the return on investment—of educational experiences are encountered in multiple literatures. This section begins with an overview of contemporary approaches to education for professional practice in the museum sector, and goes on to discuss strategies for teaching for transfer.

Education for museum professional practice

While museum workers have engaged in learning for decades, efforts to define and systematize professional education took place in the 1960s in concert with significant growth in museum numbers and increasing work specialization (P. Boylan, 2001a). Discourse on professional education focused on clarifying the scope and standards of practice, identifying needs, and considering appropriate means of providing educational supports (AAM, 1978a,

1978b, 1978c; CMA, 1978; Segger, 1976; Teather, 1978). Interest in the nature of professional education shifted in the 1980s in response to growing professionalization and debate over the integration of new approaches to museum theory and practice in the face of critiques that challenged museums' modernist stance (e.g., Blackman et al., 1988; CMA, 1984; Matelic & Brick, 1990; Vergo, 1989; Washburn, 1986; Weil, 1988)

The 1990s saw increased interest in competency articulation due to pressures for human resource development and entrepreneurial approaches to management. At the same time, emphasis on theoretical foundations for practice increased as the sector grappled with dilemmas posed by cultural relativity, representational politics, a shift from an inward preoccupation with collections to an outward focus on community obligations, and calls for more socially responsible practice (Starn, 2005). These trends continue to provide a focus in the discourse of museum education today, along with new emphases on leadership and succession, community service, diversity, and responses to pressing issues in society.

Over time, three types of education for practice have emerged, all of which stress a knowledge acquisition model since, for the most part, they are offered independently of the museum settings in which learning is applied. These include (1) preparatory undergraduate and graduate museum studies programs that emphasize conceptual and explicit procedural knowledges; (2) best practices training and networking through museums associations that serve both entry-levels and mid-career professionals; and (3) academically-based continuing professional education, offered by a small number of programs at undergraduate and graduate levels in universities and colleges. CPE programs tend to serve new and mid-career museum practitioners and, like some of the museum association programs, are designed to offer:

> ...a means for practitioners to keep up with changing procedures, technology and methods; gain the expertise needed to move to a deeper level of specialization; help individuals integrate the lessons learned from a variety of work activities to improved practices; and to provide the conditions that stimulate the expansion of the knowledge base. (N. Fuller, 2005, p. 274)

Since many museum workers are hired without prior museum-related education, but bring expertise in diverse disciplinary and functional fields, CPE can also provide a conceptual and procedural foundation to round out prior expertise and the considerable situated learning that takes place within the workplace in largely unacknowledged and often unplanned ways.

While CPE programs in academic and professional association settings address conceptual, procedural and strategic content that is similar to studies in more traditional

academic programs, they also tend to emphasize management skills (P. Boylan, 2001a), and many utilize non-traditional delivery methods including intensive coursework, online, and blended delivery models to provide the access and flexibility needed to balance work and studies. Since their existence is linked to improved practice, they need to ensure that the content they address is meaningful in the workplace. However I speculate that the following factors impact capacity to teach for transfer in the museum sector.

Alignment of continuing professional education with practice requirements:

In professions such as medicine or engineering that regulate and manage entry-level and ongoing knowledge in order to protect public interests, CPE is aligned with evolving competencies and ongoing certification. CPE builds on a foundation of knowledge established through initial training and entry-testing, and is designed and credentialed to maintain and/or develop uniform professional expertise and status. Participation, and the mastery and transfer of prescribed content, are ingrained in such systems although there may be tension over who defines and structures the content and breadth of the curriculum (Eraut, 2004).

In professions in which CPE is not explicitly required for the maintenance of competence and status, content is not closely prescribed, and participation, learning and transfer are functions of personal and/or organizational commitment to development. The existence of professional associations is helpful in regulating both work-related learning and transfer, in that such associations encourage professional interactions and behaviours. As well, professional associations define the domain-specific knowledge expected of members and articulate codes of conduct that assist in monitoring compliance with normative professional standards (Royston et al., 2002). This is certainly the case in the museum sector. While there are many pathways into and through careers, and, while museums retain and/or develop expertise in diverse ways, associations articulate core and specialized competencies and emphasize the importance of comprehensive and up-to-date knowledge and skill bases. For example, the American Association of Museums' Code of Ethics (2002) states that "professional standards and practices [must] inform and guide museum operations." (np).The Canadian Museums Association (1999) goes into greater detail in stating that museum workers owe to their institution "loyalty to its policies and the conscientious performance of their duties, improvements in competence, [and] awareness of current developments in the museum field." It also indicates that museums are obliged to ensure "that working relationships among all museum workers are clearly defined,

that shared roles and separate responsibilities are recognized for trustees, paid staff, volunteers, and contract consultants and that there is respect for the professional expertise and experience of museum workers." With reference to professional development, the CMA states that:

> Both museums and museum workers benefit from educational opportunities for development or retraining, including university or college courses of study, workshops, meetings, secondments, exchanges, conferences and membership in museological and other professional associations. Museums should support and encourage association membership and participation in staff development functions, and make appropriate provision for the equitable funding of these activities. (p. 13)

Despite these exhortations, voluntary adherence to ongoing development of knowledge and skills varies considerably across the sector (J. Davis, 2001; Demos, 2003). At the same time, CPE is designed to provide generalized content of broad relevance rather than for specific application in a particular workplace. While many professional organizations acknowledge and support development activities, none explicitly articulate learning transfer expectations.

In this unregulated context, the practitioner, either independently or with a thoughtful supervisor, must identify learning needs, seek appropriate learning opportunities, acquire generalized knowledge, and then negotiate the process of learning how to adapt and apply it within the workplace. In the absence of externally prescribed processes that define entry-level and evolving competencies in specialized areas of practice, the alignment of CPE and practice in the museum world is not formally coordinated. It is up to the educational provider to determine how to create an effective fit with needs and standards.

In addition to a lack of formal harmonization with professional practice, other factors impact the alignment of CPE with workplace requirements. A particular concern stems from recognition that much of the knowledge used in workplaces is situational and tacit, making it difficult to address in formal curriculum. At the same time, the widely endorsed proposition that learning transfers most effectively across similar situations (Billett, 2002) raises concerns about students' capacity to transfer classroom-based learning to dissimilar workplace settings. Billett (2002) observes that even when effectively aligned educational opportunities exist, "most of the ongoing development of workers' skills throughout their working lives will occur through participation in work" (p. 28).

Cultural differences between educational and workplace settings are also seen to impact the alignment of education and practice. As Lemke (1997) notes, "schools are communities of practice that do not preach what they practice. They teach about practices of

other communities" (p.52), and therefore have a very different orientation than the workplace. Even though conceptual knowledge tends to be is seen as authoritative and privileged (Eraut, 2004) in both school and practice settings, increasing recognition of the importance of situated knowledge is challenging its preeminent position. Fenwick (2006) highlights tensions between school and work, saying "workplace learning as an embodied social phenomenon challenges the academy's authority over the legitimization of knowledge" (p. 189). The intellectual and social gaps between school and workplace fragment and decontextualize professional knowledge in ways that make it difficult to transfer (Alexander & Murphy, 1999; Eraut, 2004). Part of the problem is that educational settings and workplaces tend to operate in isolation from one another (Lemke, 1997), relying on the learner to bridge gaps between theory and practice and between generalized and situated learning. Experiential learning activities are increasingly utilized to address this gap. Nevertheless, as Clarke (2002) notes with regard to learning and transfer climate, "it is widely acknowledged that there exist a number of variables involved in the training situation upon which the effectiveness of training may be contingent, many of which may be outside the actual experience of the training program itself" (p. 148).

Educational approaches that specifically address workplace requirements are not extensively explored in the discourse of museum CPE. Whether the focus is on the difficulties of teaching situated knowledge, or developing learners' capacity to relate theory to practice, in my experience, those who design and deliver museum CPE have had little exposure to the pedagogy of workplace learning. Instead, attention is focussed on creating relevant, accessible but generalized learning opportunities for adult learners who are, to a large degree, perceived as decontextualized from the workplace. While good adult education practice requires that programs recognize and draw on students' subjectivities and offer relevant content, explicit strategies to facilitate transfer are only vaguely referenced in instructional design and delivery guidelines, normally under the guise of relevance. The onus rests with agentic[5] professionals to recognize and act on opportunities for transfer.

The lack of consistent attention to how CPE content is aligned with and applied in museum practice may result from a number of interconnected characteristics of museum professional education. First of all, educators come to their positions from a range of backgrounds. Expertise in museum studies is often favoured in hiring decisions, along with

[5] I use this adjective throughout to denote professionals who exercise their agency.

knowledge of the principles of adult education. Knowledge of the relatively new domain of workplace learning is not normally required. Second, these educators tend to work in isolation from one another for geographical and competitive reasons, thereby limiting the quality of discourse around pedagogical practices. Third, the emphasis in the classroom is on the acquisition rather than the application of knowledge (UKCES, 2008). Fourth, museum engagement in designing work-related CPE is limited (Demos, 2003). As museums tend to be silent partners in the educator/ student/ workplace trinity, their situated interests are not at the forefront in instructional design—and their lack of engagement, in turn, may contribute to a lack of commitment to systematic CPE. Fifth, as Kurylo (2002) observes, there is a "...mismatch between the felt needs of museum staff and the training on offer. Senior staff are learning on a need-to-know basis. Their needs can be unpredictable and must be met quickly, yet museum associations and other training programs are working on a longer-term planning basis" (p. 2). And finally, since evaluation focuses on course effectiveness and learner satisfaction, longer-term workplace impacts are largely invisible to educators.

Under these conditions, the value of specifically aligning CPE for transfer to practice tends to be masked. While Davies encourages strategic relations between educational programs and museums, he notes that "the experience of doing a university-based course will always be different to the experience of museum work. ...Close links might help but there will always be big differences between courses and the real world of work" (2007, Section 6.38).

Relevant and timely content

Although museums and workers have specific and situated learning needs, content of CPE programs must be generalized to meet the needs of multiple participants in order to attract sufficient enrolment, and may not offer a degree of similarity that facilitates transfer. In a CRM course on curatorship, for example, participants may include curators, educators, collections technicians, exhibit designers and directors who work in such diverse settings as community museums, aboriginal cultural centres, zoos or historic sites. They may be at different levels in their mastery of specialized practices, and their workplaces may have differing needs for curatorial expertise. Some may be focussed on work-based problems, while others are focussed on career change. The degree to which content is meaningful is subjectively determined. This, in turn, influences participants' learning and the likelihood of transfer. While a range of CPE programs offer different levels and specializations in museum practice, it is likely that

educational providers' tendency to offer a "'one-size fits all' approach to program design and delivery" (Kurylo, 2002, p. 3) may not fully meet all learners' needs.

The structure of conceptual, procedural and strategic content is loosely mapped out by curricula articulated by professional associations to inform both practice and museum studies content. The most influential of these is offered by the International Committee for the Training of Personnel (ICTOP) of the International Council of Museums (ICOM) of Unesco (2008). *Draft Curricula Guidelines for Professional Development* covers "the skills, knowledge and abilities needed by the personnel of museums to operate successfully" (p. 1). Given the diversity of museums and functional areas, the imperative of career-long learning, and the range of educational providers, ICTOP emphasizes that the *Guidelines* do not prescribe content. In the absence of an accredited curriculum to prepare and continuously develop museum professionals, educational providers tend to adapt such curricula in accordance with the perceived needs of students and the level and focus of their programs.

To a certain extent, the needs and interests of the marketplace also determine CPE content, since learners tend to select courses that reinforce their understanding of what constitutes effective practice. In the experience of the CRM program, it is always easier to attract learners to courses that address broadly recognized functions (ie. collections management, exhibition design) than to introduce new topics whose relevance and utility have not been established (ie. information management or inclusive approaches to curatorship in the early 1990s; visitor experience design or performance measurement at the current time). And it is very difficult to attract learners to courses that address topics that cannot be easily linked to improved performance (such as ethics, philosophy or policy development).

Instructional strategies for adult learners

Although aligning content to meet the needs of practice can be complex and challenging, a number of authors recognize that educators are positioned to use approaches to 'teaching for transfer' that enhance the likelihood that content will be applicable (e.g., Alexander & Murphy, 1999; Eddy & Tannenbaum, 2003; Facteau et al., 1995; Hutchins, 2009; Illeris, 2009; Marini & Genereux, 1995; McKeough et al., 1995; R. Stark et al., 1999; Taylor, 2003), although some describe the salient literature as limited and anecdotal (Burke & Hutchins, 2007). Teaching for transfer includes:

- developing strategic knowledge including meta-cognitive skills, dispositions and motivation for transfer that encourage the learner to perceive the value of transfer along with opportunities for the application of knowledge (Alexander & Murphy, 1999; De Corte, 2003; Haskell, 2001; Pea, 1987; Sternberg & Frensch, 1996);
- developing explicit learning goals related to workplace requirements (Simons, 1999);
- being explicit about links between theory and practice (Haskell, 2001);
- providing realistic problems and practical opportunities for the application of skills and knowledge through experiential learning or work-related assignments (De Corte, 2003);
- providing exemplars of effective transfer (Dettermam, 1996; Haskell, 2001); and
- recognizing learners' subjectivities and situational requirements (Billett & Smith, 2006; Simons, 1999).

This brief listing echoes exemplary practices for teaching/learning described in the literature of adult and continuing professional education, and indicates that these sources also provide important references in the discussion of transfer (e.g., Cranton, 1996; Merriam et al., 2007). While specific attention to transfer tends to be very limited within the adult and continuing education world (Caffarrella, 2002), perhaps because such literatures are focussed on what happens in the classroom rather than the workplace, they share similar concerns. Professionals, as adults, are predicted to hold particular values and expectations and to behave in certain ways when engaging in learning activities. The seminal rubric of characteristics of adult learners offered by Knowles in the 1980s continues to provide insight, although his theory of andragogy is contested for its tendency to stereotype, its lack of theoretical depth, and from the recognition that these principles are germane to teaching adolescents (Merriam et al., 2007). Knowles emphasizes that adult learners draw on experience, that learning is linked with developmental needs, that intrinsic motivation is more powerful than extrinsic, and that adults need to know why they are learning (Knowles, 1980; Knowles et al., 2005a).

These characteristics are significant in discussions of teaching for transfer as they suggest design strategies to make CPE meaningful to adults. However, even if these characteristics broadly describe adult learners, significant variation is encountered in learners' ontological and epistemological assumptions, developmental stages, life experiences, motivations and rewards, and the philosophical, cultural and professional contexts in which they

consider, make sense of, and apply learning (Merriam et al., 2007). And the best efforts of programmers to create meaningful learning experiences can only be as successful as the readiness and capacity of learners to learn—and to learn to apply their learning. While programmers can create 'planned curriculum' and be responsive to diverse and subjective ways in which students engage to shape 'lived curricula' (Aoki, 1993), it is the learner who constructs meaning and determines what is done with newfound knowledge.

Although learner characteristics vary, principles of teaching for transfer and adult learning offer useful frameworks for planning and critiquing CPE. Many of these principles are integrated within the American Association of Museums' Training Standards and Best Practices Guidelines (COMPT-AAM, 2010). This document provides guidelines for educators, and identifies core content, teaching methodologies, and performance measures. It does not explicitly set transfer as an outcome; however relevance to practice may be seen as a core value of professional education and a proxy for transfer. These guidelines are offered for voluntary compliance since North American museum studies programs in academic or association settings are not accredited, nor is there a standardized paradigm to assess quality (Schwartzer, 2001). While many programs follow curricula, their scope and standards are also set by the host university or professional association and their quality can be a function of available resources. As Kurylo (2002) notes, "although we have developed an understanding of effective learning techniques, this knowledge is not routinely applied" (p. 2). She observes that some CPE programs rely on:

> ...inexpensive sources of instruction, often local museum practitioners.... As a result, the quality of instruction can vary widely. Few museum workers, no matter how good their expertise, are going to devote time to learning how to teach more effectively if this is not their full time career. More importantly, often the knowledge base of regular contributors to training programs is static.... This leads to disillusion with training programs. (p. 2)

While these limitations are by no means universal, Kurylo's observation suggests that the use of exemplary practices to support teaching for effective professional development and transfer across the sector may be uneven. This is consistent with Webster-Wright's (2009) observation that, while research indicates that effective professional development must be "continuing, active, social, and related to practice"(p. 703), there is a disparity between research findings and teaching in most professions. This discussion of teaching for transfer in the museum sector also highlights that, while educators can set the stage for transfer through

choices of content and instructional methods, the actual process of transfer takes place *after* learners leave the classroom and is subject to factors that are largely beyond educators' control. Developing awareness of the degree to which agency and workplace climate facilitate transfer helps to round out understanding of the scope and capacity of CPE to influence practice.

Agency and Affordances as Interdependent Phenomena

Both content and instructional factors play significant roles in determining the likelihood that learning will be transferred to the museum. Accordingly, their influence is noted in my case analyses when learners reference these topics. However, as noted earlier, the primary focus in study cases is on the degree to which workplaces climate and individual agency shape learners' experiences in applying newfound knowledge and skills. In focusing on the implications of workplace climate and agency for transfer in the following sections, I address them as separate categories in order to describe contributing factors. However, in thinking about factors and using them as a conceptual framework for case analyses, it is important that their relational interdependence be recognized. Transfer scholars who write from a socio-cultural perspective hold that learners and workplaces exist in a "recursive and mutually constitutive relation to one another across time. Consequently our experiences of continuity and transformation across time and social situations are neither a function of the individual nor the situation, but rather of their relation" (Tuomi-Grohn & Engeström, 2003, p. 27).

Billet (2008), whose extensive research focuses on learning within workplaces, comments that:

> …studies of learning through working life identify how workplaces' affordances—those that invite workers in particular ways to participate, access support and reward—are generated and projected… Yet, personal agency, subjectivity, and intentionality also shape individuals' cognitive experience in ways that mediate how they construe, interpret, and construct what is afforded them in workplace settings. (pp. 232-233)

He goes on to state that "the relationship between the two…is negotiated and relational, rather than being equal or reciprocal" (p. 233) and is grounded in both personal and organizational histories. As he notes elsewhere, "individuals' engagement with work is held to be co-participative—an interaction between how the workplace affords participation and how individuals elect to participate in that social practice" (2002, p. 29). Each situation is seen to be unique, based on the individual's life history and, as people engage with and learn through work

tasks, they not only learn, but "this constructive process also constitutes the active remaking and transformation of culturally derived practices that comprise paid work" (2008, p. 233).

This theme is echoed by Lehtinen (2008) who comments that an individual's work motivation "is not a simple causal consequence of objective work conditions, but is mediated through complex social interaction patterns between the individual and significant others in his or her environments and is always dependent on individual's interpretations of these conditions" (p. 262). This suggests that balancing agency and affordance factors and recognizing their interdependence in the museum sector calls for caution. Fuller and Unwin (2004) note that an overemphasis on the structural character and features of the organizational environment can underplay "the role of individual's backgrounds, prior attainments, attitudes, wider experiences and agency," while overemphasis on learners' experiences can "divert attention from the influence of the organization and wider institutional context in which learning occurs" (p. 133).

As transfer in this study is seen as a learning process that takes place primarily within the workplace once the CPE course is over, the importance of the relational interdependence of agency and affordances contributes to both the complexity and the explanatory strength of these factors. Yelon and Ford (1999) note that recent research offers clues that:

> ...certain variables interact in noticeable patterns to produce transfer. There seems to be evidence that workers take different but orderly and predictable paths under varying circumstances when using what they have learned. Transfer may not be just a complex process; transfer may be a complex set of processes. (p. 59)

These complex processes are explored here as a basis for interpreting differing paths that are detected in museum case settings.

How Does the Workplace Influence the Application of Learning?

Arguably the most complex category of influential transfer factors is the climate—or the affordances and supports—that workplaces present for the application of new knowledge and practices. Workplaces are characterized as goal-oriented systems that are not normally focussed on learning, but which value learning as an inherent aspect of competitive positioning (Rainbird et al., 2004a). As Sessa and London (2006) note, while organizations are preoccupied by 'intention-bound work' associated with their mission and purpose, "they have learning mechanisms built into their very being" as a means of achieving goals or dealing with disturbances in their environments (p. 5). Billet and Smith (2006) and others suggest that work and learning are inseparable. Workplaces are seen to be "significant developmental sites for

adult learning, change and resistance" (Fenwick, 2006, p. 187). Fenwick alludes to the value of workplace expertise in noting that "unlike instructional or everyday contexts, learning occurs in the press of 'hot action': decisions must be made and action taken without certainty or prior knowledge, often in contested terrain with serious consequences" (p. 187). The existence of such tension in workplaces is seen to create opportunities for learning (Sessa & London, 2006) as long as other factors also contribute to organizational readiness—and as long as the workplace is 'invitational' in its encouragement of new practices (Billett, 2002).

The importance of conditions and affordances to apply learning is emphasized (e.g., Gilley & Hoekstra, 2003; Rouiller & Goldstein, 1993). "The evidence is overwhelming that training efforts must be supplemented by significant and visible support from key stakeholders…to ensure that the desired performance actually occurs on the job. This requirement is substantiated over and over" (Broad, 2005, p. 93). Literatures that address management and organizational development stress the importance of positive climates for transfer. "Transfer climate can be regarded as perceptions describing characteristics of the work environment that may facilitate or inhibit the use of trained skills" (Gilley & Hoekstra, 2003, p. 272). Rouiller and Goldstein (1993) describe climate as the "situations and consequences that either inhibit or help to facilitate transfer of what has been learned into the job situation" (p. 379). Positive climates include "adequate resources, cues that serve to remind trainees of what they have learned, opportunities to use skills, frequent feedback, and favorable consequences for using training content" (Colquitt et al., 2000, p. 681).

Various authors cluster the organizational characteristics that are seen to influence transfer in different ways and utilize varied terminologies to describe these factors (e.g., Elwood F. Holton et al., 2007; Rouiller & Goldstein, 1993). In the absence of a commonly accepted framework for studying transfer from an organizational perspective (Lim & Johnson, 2002), the following discussion is an amalgam from the literature and is presented within two categories. The first considers ways in which pan-organizational factors contribute to transfer. The second looks more specifically at position-level factors.

- Organizational Factors
    - nature and culture of the organization
    - organizational perspectives on learning and employee development
    - policies and procedures for learning and transfer
    - pressures for change

- Positional Factors
    - job design and level
    - performance expectations
    - supervisory and collegial supports
    - timely opportunities for transfer
    - similarity and relevance to task requirements
    - available resources

The following synopsis of ways these factors are likely to influence transfer draws on both the transfer and museum literatures. Some factors are discussed in greater detail than others if they are complex or seem of particular relevance to the distinctive character of museums.

Organizational factors

Sessa and London (2006) define organizations as "a group of people intentionally organized to accomplish a particular goal or set of goals" (p. 160), and emphasize that they are engaged in continuous, at times arduous, learning processes to achieve goals and cope with change. Accordingly, the ways in which learning—and transfer—are valued and supported at the organizational level are widely perceived to be influential in creating an invitational environment for the transition of learning from the classroom to the workplace (Lim & Johnson, 2002).

Nature and culture of the organization:

The discussion of transfer is primarily focussed on organizations that have profit as a bottom line (Clarke, 2002), although some scholars have focussed on the military (Anton, 1984), government (Baharim, 2008; Hughes, 2004; Zakreski, 2003), teaching (Benander & Lightner, 2005; Evans et al., 2011) or the helping professions (Clarke, 2002; Curry et al., 1994; Daley, 2001; Daley, 2000; Daley, 2002; Fowler & Lee, 2007; JHPIEGO, 2002). Clarke observes that "we are still some way from determining precisely which aspects of the work environment mediate training transfer and *in particular* whether such aspects generalize across all organisational settings" (p. 148, author's italics). As no studies were found that look at transfer in not-for-profit organizations in the cultural heritage sector, there is no empirical foundation for predicting ways in which distinctive museum characteristics shape the likelihood of transfer. Certainly a heavy emphasis on transfer as a basis for productivity leading to profit would not normally apply, although productivity that results in public benefit and ensures a balanced budget is a very real

dynamic in the museum world. Focuses on the stewardship and management of collections, information, and other heritage resources for the public benefit imbue museums and heritage sites with domain-specific characteristics. At the same time, the museum sector's commitment to public education and increasingly to socially engaged practice suggests a set of performance measures that differ substantially from those of the corporate world (Weil, 1996). While the specific nature of professional practice is seen to shape transfer processes through (1) affiliation to a externally expressed norms; (2) service orientation; (3) variations in organizational culture; and (4) levels of independence and autonomy (Daley, 2001), how this plays out in the museum is unknown.

Nevertheless, since many management principles and methods used in the for-profit world are also important in museums, it seems probable that there are similarities in ways that they set goals, value learning, develop staff, and support best practices and innovation. Such similarities suggest that transfer dynamics will also be somewhat similar in nature, although the degree may differ. Just as the particular character of museum professionals may shape their agency for transfer, so the particular character of museums may shape the climate that they provide for transfer—and of course as transfer is seen to be co-participative, the end result is inevitably a unique product of this mix. This study provides opportunities to observe transfer dynamics in the museum sector for the first time and to reflect on the degree to which they align with propositions derived through studies in the for-profit sector.

The impact of the nature of the organization on learning and transfer is also shaped by factors other than overall purpose (Murtonen et al., 2008). These can be discussed in the context of systems that define the organization. Recognizing organizations as systems aligns with systems theory that is commonly referenced in workplace learning (Billett, 2002; Broad, 2007; Engeström & Kerosuo, 2006; Fenwick, 2008; Lemke, 1997) as an explanatory means of developing "a unified account of knowing and doing" (Blackler, 1995, p. 1035). A critical assumption of systems views is that actions of individuals are integral to and embedded within the activity of organizational systems. Blackler (1995) states that workers "employ their situated knowledge in a situation that is itself constantly developing. In response to this changing situation, participants' knowledge and behaviour will also inevitably develop" and notes that learning takes place when there is a disturbance in the system as a result of "incoherences, paradoxes and conflicts" (p. 1037).

Organizational systems vary according to size and complexity (Broad, 2005). Small organizations tend to have moderately complex operational systems in which communication can be relatively straightforward and the chain of command is visible and accessible. What small organizations may lack in scope or resources, they may make up for in their capacity for nimble responses to pressures for change (J. Davis et al., 2004; Falk & Sheppard, 2006). For example, Bailey (2006) observes that smaller museums involve staff in key decision-making, and encourage colleagues to "step into each other's shoes" (p. 183) to resolve issues. Bailey also notes that "this kind of intimate working environment can engender high feelings of responsibility and obligation toward one's co-workers and the institution, as well as motivate people to accomplish needed tasks" (p. 183).

Organizations that are large and multifaceted or a component within a larger system are considered highly complex (Broad, 2005, p. 232). While these tend to encompass multiple areas of specialized practice that may have considerable internal autonomy, the complex social relations involved in goal-setting, decision-making and communication may mitigate against straightforward introduction of new practices. On the other hand, these may offer "a broader professional perspective [and] growth opportunities" (Bailey, 2006a, p. 183).

The values, goals, priorities and power relations that shape organizational culture are also seen as influential in transfer. "Individual, team, department, and agency goals influence the relevance and value given to training and knowledge application. Clarifying these goals, as well as the organization's overall goals, can lay the foundation and provide direction for transfer interventions" (Curry et al., 1994, p. 2). These authors, writing from a social work perspective, point out that the converse is also likely. "Transfer failure often can be traced to a lack of clarity in the organization and its subdivisions' training goals, roles, and rules."

Management capacity to recognize the benefits of new practices and to support learning, along with reward systems, timely decision-making processes, institutional rules and regulations, and a culture that encourages the introduction of new perspectives and practices, is also seen to influence transfer (Curry et al., 1994). Rouiller and Goldstein (1993) conducted a study of managers that established a link between a positive transfer climate and transfer behaviours and conclude that climate is at least as important as learning in the classroom in influencing transfer. "Situational cues and consequences were each separately found to significantly add to the explained variance in the degree of transfer behaviour and to independently contribute to transfer behaviour" (p. 388). As Szulanki (1996) observes:

> Like a plant, a transfer that unfolds fully in one context may grow poorly in another or stagnate in a third. An organizational context that facilitates the development of transfers is said to be fertile. Conversely, a context that hinders the gestation and evolution of transfers is said to be barren. (pp. 32-33)

Organizational culture is shaped, in part, by the way it values knowledge and learning. Many museums see themselves as 'knowledge organizations' involved in work defined "as when individuals receive information from a variety of sources, use that information to derive a set of solutions, and generate new sets of information as a result of their own inputs" (Jacobs & Park, 2009, p. 135). As such, museums are positioned to play a role in the transition from an industrial to a knowledge economy. Their knowledge resources lie in collections, the associated knowledge that lends collections meaning, their capacity to mediate knowledge of source communities and to generate new knowledge through research, and the expertise of staff. As knowledge organizations, museums recognize the congruence of learning organization concepts, as set out in the work of Senge (1990), Garvin (2000) and others. A learning organization is "skilled at creating, acquiring and transferring knowledge, and at modifying its behaviour to reflect new knowledge and insights" (Kirwan, 2009, citing Garvin 2003, p. 114).

At the heart of a complex and systematic commitment to organizational learning is the notion that unlike episodic training, both individual and collective learning are inseparable from the everyday work of the organization. Watkins and Marsick (1993) list seven 'action imperatives' that characterize a learning culture: create continuous learning opportunities, promote inquiry and dialogue, encourage collaboration and team learning, establish systems to capture and share learning, empower people to have a collective vision, connect the organization to the environment, and ensure that leaders model and support learning at the individual, team, and organizational levels. The concept of the learning organization is critiqued since the notion that an organization has a capacity to learn is seen as problematic, and since it does not explicitly recognize the role of transfer as a means of acknowledging individual contributions to organizational learning (Zakreski, 2003).

Nevertheless, these influential ideas have been widely discussed in the museum sector (e.g., Dixon, 1999; Falk & Sheppard, 2006) and have informed management practice to the degree that a range of museums claim this status. The level of commitment to museum-wide learning—and to professionalism (Tran & King, 2007)—is likely to influence how supportive and invitational the museum is in welcoming and integrating new knowledge.

The organizational culture and context, whether shaped by the principles of the learning organization or not, is also characterized by rules, written and unwritten, internal and external, that influence the employment relationship and set the tone for learning and transfer (Rainbird et al., 2004b). External rules might include legal requirements for incorporation and labour laws, health and safety provisions, along with the standards of credentialing and practice set out by regulatory or professional bodies. In the museum sector, legal expectations of stewardship of collections and accountability for public funds sets the stage for a wide ranging body of ethical and practical guidelines for practice. The degree to which museums publically and privately exceed minimum legal standards is uncertain in the absence of widespread accreditation. However, both the general commitment of boards and professional staff to stewardship and ethical practice, and the requirements of external funding bodies help ensure a generally high standard of compliance that I observe with professionally articulated best practice 'rules.'

Internal rules that shape the learning environment can include policies and procedures, along with approaches to hiring, compensation and promotion; formal and informal hierarchies for decision-making, organizational and skills planning, and learning expectations established through collective agreements and contracts. These regulate work flow and, in positive environments, create conditions for learning and new practices. As Kirwan (2009) notes "work environments…that inhibit learning transfer are those where work overload and a focus on short-term goals mitigate against people finding the time to reflect on and experiment with new learning" (p. 117).

A key finding of a study of approaches to workforce development in Britain's museums, archives and libraries is the lack of cultural supports within these organizations. The study observes that while lack of time and money are deterrents to participation in learning activities, a cultural problem is that "willpower is lacking, that inertia rules, or worse, there is a positive hostility to learning" (Demos, 2003, p. 5). They attribute this to years of demoralizing cutbacks and increasing demands for accountability, and comment that:

> ...confronting this cultural malaise is the biggest challenge facing workforce development. Somehow we need to reach a tipping point where investment, exhortation, listening and example persuade everyone in the sector that for their own good, and for the good of their users, they must take training, development and learning seriously. (p. 5)

The mix of goals, values and rules that constitute organizational nature and culture is instrumental in establishing the social and power relations in which learners acquire and apply new practices. These set the general climate in which learning initiatives play out.

Organizational perspectives on learning and employee development

More specifically, rules, policies and procedures that articulate an organization's values, attitudes and strategies for both learning and the application of learned knowledge and skills are "a matter of design" (Ellstrom, 2011, p. 107) that contribute to a climate for transfer. These can include strategic analyses of knowledge requirements, professional development policies, systematic performance and learning planning, and preparatory and debriefing strategies that maximize the efficacy of learning and transfer processes (Zakreski, 2003). The presence of these, along with the degree to which they are supported with funding and time, contribute to the likelihood that learning matches the needs of the organization and is taken seriously. "The value placed on training by the organization conveys strong messages about how seriously employees view training, and whether knowledge transfer is enhanced or impeded" (Curry et al., 1994, p. 2). Bandura (2001) extends the concept of intentional approaches for learning to organizations, commenting that capacity for agency must exist at the organizational as well as the individual level. "Organizations have to be fast learners and continuously innovative to survive and prosper under rapidly changing technologies and global marketplaces. They face the paradox of preparing for change at the height of success. Slow changers become big losers" (p. 11).

While such concepts are articulated in the human resource management literature as instrumental in organizational development and employee morale and retention, their application across many different kinds of organizations is seen to be uneven. Naquin and Baldwin (2003) observe that provisions to enhance learning and transfer have not been "actively managed" and say "we contend that this helps account for the consistently dismal estimates of transfer yield (for example often as little as 10 percent) so ubiquitous in the transfer literature" (p. 81). Szulanski (1996) reflects that if best practice does not transfer, a gap develops between "what is known within the organization and what is actually put to use" (p. 38). They speculate that this "may be less because organizations do not want to learn what they know but rather because they do not know how to" (p.38).

Fuller and Unwin (2004, 2011) offer a continuum model of organizational approaches to workforce development which identifies features of the work environment that, when taken

together, influence the extent to which it either enables or constrains learning. They base this on evidence from research that shows that an expansive environment that is supportive of individually championed knowledge "is likely to increase the quantity and range of opportunities for [learner] participation and therefore for employee learning" (2004, p. 131). While this model is generated through their studies of learning within workplaces, it values 'off-the-job" courses along with participation in external communities of practice, thereby creating a conceptual framework that may be helpful in considering the transfer climate in museum case studies. Fuller and Unwin (2004) indicate that this model can contribute to "understanding the uneven quality of the learning environments we have encountered" (p. 129).

Approaches to Workforce Development[6]	
Expansive	**Restrictive**
Participation in different communities of practice is encouraged—job/team boundaries can be crossed	Participation restricted to immediate work team area—boundary crossing is discouraged
Primary community of practice has shared 'participative memory'	Primary community of practice operates without reference to cumulative expertise
Vision of workplace learning—career progression	Short termism—get the job done
Recognition and support for workers as learners—newcomers (including trainees) given time to become full members of the community	Workers seen only as productive units—fast transition from newcomer/trainee to fully productive worker
Workforce development used as a vehicle for aligning goals of the organization and of the individual	Workforce development used only to tailor individual capability to organizational goals
Skills widely distributed through workplace—multi-dimensional concept of expertise	Polarized distribution of skills—knowledge/expertise regarded as confined to key workers
Planned time off-the-job for reflection and deeper learning beyond immediate job requirements	All training on-the-job and limited to immediate job requirements
Managers given time to support workforce development and facilitate workplace learning	Managers restricted to controlling workforce and meeting targets
Workers given discretion to make judgements and contribute to decision-making	Discretion limited to key workers—no employee involvement in workplace decisions

Table 1: Approaches to Workforce Development

[6] This 2011 continuum model is a compressed and revised version of the 2004 model (A. Fuller & Unwin, 2004) and is referenced in Chapters 4 and 5 to assess environments in the case settings.

Expansive learning environments allow for "substantial horizontal, cross-boundary activity, dialogue and problem solving" (2004, p. 136) and "generate multi-dimensional, heterogeneous and reflexive forms of expertise" (2011, p. 52). Such environments encourage a symbiotic relationship between personal and organizational goals. Restrictive environments, by contrast, are characterized by a narrow range of homogeneous tasks and knowledges, and require confined, hierarchical and unreflexive forms of expertise. Creating an expansive environment that explicitly puts transfer supports in place is seen to be challenging. Naquin and Baldwin (2003) note, "given the dearth of active transfer interventions in organizations, we would submit that, where positive transfer has been observed, it has often been a function of highly motivated and learning-agile individuals succeeding in relatively unmanaged and unsupported transfer conditions" (p. 94).

Observations on the importance—but uneven quality—of organizational supports for learning and workforce development in the transfer literature are echoed in the museum literature. An early survey of labour force development emphasized that the quality of museum activity "is determined by the knowledge and capabilities of its staff. Through sound museological practices, staff must strive to ensure continuity in the museum's operation. The training available to staff has a profound effect on the overall functioning of the museum" (Ekos, 1988, p. 17).

In the museum world attention to human resource (HR) development tends to be discussed in terms of benefits for management and employee relations. Discussion of HR practices began in the 1980s and gained prominence 1990s as museums embraced more systematic management approaches and recognized that the quality of work is largely dependent on the quality of staff. In Canada, this is emphasized in *People, Survival, Change and Success* (CMA, 1995a) which notes that "as institutions, we reflect society. We must know how to adapt to various changes and have the ability to do so. In order to accomplish this, museums need to invest in their personnel, otherwise they will be condemned to stagnate" (p. 3). A similar commitment is expressed by the professional association in Italy which affirms that it is on the staff "that the efficacy and the efficiency of any institute depend. In other words, they represent the present and future of our museums" (Ruge, 2008, p. 6).

A range of guidelines to support improved HR practices has been developed to compensate, in part, for the general absence of human resource expertise in the museum

sector, and to address concerns that human resource practices across the cultural sector were being described as “a culture of exploitation” (CHRC, 2002, p. 7).

> The issue is essentially one of priority and preoccupation: the vast majority of cultural organizations…in their focus on creating and presenting their artistic work while balancing their budgets, do not appreciate the importance and relevance of human resources as a central concern in their daily activities…. Historically, Canadian cultural organizations have not hired human resource professionals on staff or accessed professional HR consultants, resulting in an underdeveloped knowledge base and skill base in HR matters. As a result, and compounded by a chronic shortage of resources over the past two decades, cultural organizations across the country have had weak human resource management practices, with an inadequate focus on human resource needs, policies, best practices, and requirements. This has manifested in a myriad of human resource problems in the sector, the most critical of which are poor wages and working conditions, a lack of commitment to professional development, failure to plan for succession, and tensions in the workplace on many levels. (pp. 6-7)

The degree to which HR practices, including appropriate job descriptions, performance planning, job and career goal setting, resource allocation for professional development, and debriefing and knowledge transition strategies, are in place in a museum will determine the success that learners have in putting new knowledge to work. Such measures are uneven across the sector despite guidelines for practice. The Canadian Museums Association (2009b) offers an HR Toolkit designed to help museums “attract the right type of people, retain…good employees, and motivate them to be an integral part of the organization's success“ (np). While the listing of policies and procedures for identifying and recruiting appropriate staff and treating them in respectful ways is useful, both staff development and links between learning and museum performance have a low profile. For example, it does not include a recommendation for a professional development policy in its listing of employee policies (Section 2), and it notes that “the major reason for performance review is to ensure that the employee’s activities are in line with the organization’s goals and visions as well as creating and maintaining a motivated and contented workforce” (Section 6). While it recognizes that performance reviews help ensure that “everyone knows what they should be doing,” it does not emphasize the systematic developmental value of a detailed plan, saying that the performance review “can range anywhere from an occasional chat with the employee to a professional performance rating” (Section 6). A similar low profile for professional development exists in the American Association of Museums’ *Guide to Writing an Employee Handbook* (Roosa & Chin, 2002) which devotes two pages to processes for writing a professional development policy but does not discuss

performance planning or supports for learning. Although it mentions performance appraisal, this is seen as a retrospective process that is not linked to performance development.

While the value of appropriate HR practices is noted by professional associations and a handful of authors (Boylan, 2001b; CMA, 1984, 1995a, 1995b; M. Davies, 2007; Falk & Sheppard, 2006; Matelic & Brick, 1990; Robinson, 2007), the lack of support for learning and staff development was observed in an early study on sectoral training needs.

> In Canada, there has been a general insensitivity at administrative levels to the need for training…very few major institutions have any form of planned staff training program. There is still almost total neglect of planning for staffing requirements and skills as part of programme and facility development. Due to the fact that training has been such an important concern on the part of industry, commerce and government for many years, this attitude is surprising. It must be recognized, however, that the blame cannot be laid entirely at the feet of administration. The museum director occupies an unenviable position today, caught amidst the vagaries of fluctuating fiscal arrangements, changing cultural policies, the demands of increasingly articulate employees, board pressure, and the requirements of various funding agencies. (Segger, 1981, p. 21)

The uneven quality of management support continues to be observed. Boylan (2006) notes that "there is still much to be done to convince employers—and, sadly, some fellow professionals—that professional training and qualifications are essential in the face of the increasing complexity of museum work" (p. 430). The British research firm Demos (2003) comments that effective development needs to occur:

> ... within a framework of assessment of individual and organisational need, aspiration and potential. Our research discovered that in many organizations, no such framework exists. Staff appraisals tend to be backward looking, and are not always linked to a development programme for the individual. Nor are employers making a link between skills foresight exercises, organizational plans and the consequent staff development needs. Too often training occurs on an ad hoc basis. (p. 15)

The Demos study also reflects that "…the basic building blocks of workforce development, such as personal development plans for all members of staff and training budgets are patchy" and that development strategies, where they do exist, favour established professions and continuing employees. "…there is little evidence that workforce development is based on a conception of the whole organisation—from volunteer to cleaner to chief executive. Provision for the fuzzier parts of the workforce, including contract workers, freelancers, part-time workers and volunteers is weak" (p. 24).

While Demos emphasizes the importance of a progressive and coherent approach to workforce development, "not a pot luck or scatter gun approach" (p. 15), five years later, the

Britain's *Cultural Heritage Blueprint* observes that "there is an under-investment in training and development and the sector is missing out on opportunities to nurture and develop its staff" (UKCES, 2008, Section 2.5). Woollard (2006) observes that since much museum funding is grant-based and does not include provision for skills development, this project-oriented environment requires the professional to be able to assess their own capacities on an as-needed basis and learn on the fly.

In Canada there has been little research specifically associated with HR management in the museum sector. There is increasing attention to HR within the broader not-for-profit sector, although a recent report notes that "mechanisms for understanding and addressing this sector's labour force challenges are in a very early stage" (HR Council, 2008, p. 2).

Pressures for change

Learning generally, as well as in the museum world, is inextricably linked with change in such realms as technology, diversity and inclusion, funding (Hooper-Greenhill, 2000). Sessa and London (2006) offer a model that suggests how varied conditions impact organizational learning in the face of change. They note that a system's readiness for change, relative to environmental demands, will be influential in the success of continuous learning (and presumably of transfer), as illustrated in the following table adapted from Sessa and London (Figure 1.3: p. 11):

		Organizational Readiness for Change	
		Not Ready	Ready
Pressures for Change in the Environment	Low	Status Quo	Frustration, disappointment, struggle; persistence leads to success
	High	Learning failure beyond adaptation	Continuous learning

Table 2. Likelihood of organizational change.

Given the degree to which change has become a defining feature of museums, coping with change through learning would appear to be an imperative. Such change is seen to result from the need for "sheer economic survival to a fundamental redefinition in purpose" (Matelic, 2007, p. 5) and is a pervasive theme in museum discourse. Some museums embrace change, while others resist (Hooper-Greenhill, 2000; Janes, 2009; Matelic, 2008).

Sessa and London's matrix reminds us that when the demand for change is high, but the organization is not ready, learning and transfer are unlikely. "A mismatch in need and readiness

in either direction…is likely to cause a collision and the collapse, or at least weakening, of the system" (p. 10). A museum's readiness for change is determined by a mix of factors including clarity of mission and core values, supportive systems (Bearman & Geber, 2008), leadership and persistence, time and patience (Griffin et al., 2007) adequate resources, and a willingness to escape the "tyranny of tradition" (Janes, 1997) by embracing new practices. Matelic (2008, p. 9) in her research on change in history museums, developed a synopsis of conditions that influence ways in which change is embraced. It is interesting that those characteristics that facilitate change look much like the factors that create invitational conditions for transfer:

Facilitating and Inhibiting Conditions for Organizational Change in History Organizations	
Opportunities: conditions facilitating change	**Constraints:** conditions inhibiting change
Relatively unstable environment, crisis	Relatively stable environment
Dramatic shifts and/or decline in attendance, financial support	Gradual increase in attendance, financial support
Support for new and/or experimental programs, exhibits, events, with focus on visitor experiences, external input	Modest changes and/or revisions in programs, exhibits, events, with focus on scholarship, internal expertise/input
Major expansion of collections and/or facilities	Slight growth in collections and/or facilities
Staff salaries/benefits stable/declining, but HR (human resources) viewed as important organizational investment	Small but steady increases in staff/benefits, but HR (human resources) viewed as significant organizational cost
Strong support for new direction/initiatives, e.g., new grants, new legislation, community engagement initiatives	Strong resistance to change from internal stakeholders, e.g., board members, professional staff, volunteers w/ long tenure
Director/CEO: new, with mandate and support for change and transformation	Director/CEO: long tenure, support for status quo, established control systems
Support for risk and shared power—decentralized structures	Fear of risk, loss of power and control—centralized structures
Changing community, new expectations, lack of awareness or support for organization	Relatively stable community support, traditional expectations, and awareness of organization
Support for new professional initiatives, trends, and mandates	Insulation from professional initiatives, trends and mandates
Culture of learning, new mindset of museums as community-driven organizations (continually transforming themselves)	Culture of preserving tradition and norms, conservative mindset ("museums don't change")
Effectiveness paradigm: long term outcomes, value placed on qualitative measures, e.g., learning, systems thinking, group processes, new partnerships	Efficiency paradigm: short term focus, value placed on quantitative measures, e.g., attendance figures, bottom line, balancing budget, productivity from tasks

Table 3. Facilitating and inhibiting conditions for change in history organizations.

These conditions for change highlight the external influences of both communities and professional associations in creating expectations for new practices. While some of these may be perceived at the organizational level, others would be conveyed through CPE to learners who are then challenged to advocate for them in workplace settings. Personal commitments to environmentally friendly or socially responsible practices in museum work might also be influential. Although I did not find any references to the influence of external pressures in the literature that describes factors impacting transfer, it is certainly conceivable that learners in this study will recognize obligations and affordances to respond to such pressures. This may be of particular personal importance if the learning experience is seen to be transformational.

Positional factors

While organizational factors exert a distal influence on learning and transfer (Aguinis & Kraiger, 2009), particularly in large institutions, the learner's position is seen to play a particularly influential role in the likelihood of transfer since it is within this proximal setting that the learners' capacity to exercise agency is normally supported or inhibited. As Fuller and Unwin (2011) note, "...work organization and job design affect the extent to which employees have access to knowledge and are able to create new knowledge in the process of their work" (p. 56). A range of social and logistical factors are linked to position and impact the degree to which the learner can affect transfer.

Job design and level

The nature and status of the learner's job, the nature of knowledge required for effective practice, along with its degree of authority and professional autonomy, shapes participation in work and influences the learner's capacity to effect change in established practices within the job and across the organization (Awoniyi et al., 2002; Billett, 2002; Edwards, 2010). This has both logistical dimensions. At the logistical level, the greater the independence in decision-making and accountability inherent in the position, the greater the capacity of the worker to exercise control in the introduction of new practices. Conversely, when multiple perspectives must be considered in the accomplishment of work, the more complex the process of advocating and building support for new practices. Another aspect of job design that is not widely addressed in the literature, but is potentially relevant in this study, is the degree of creativity inherent in work. Awoniyi et al. (2002) find that as creativity increases, so does

transfer of training. They suggest that this is linked with lower stress levels and higher job satisfaction.

The position of the job within the organizational structure is also seen as influential. Flat and collaborative organizational and decision-making structures that allow for horizontal interchanges of expertise enable workers to move into unfamiliar terrain or cross positional boundaries as they seek to adapt their learning in meaningful ways. Conversely, more hierarchical or 'silo'ed organizational structures that limit boundary-crossing tend to also limit the application of new knowledge outside established functional areas (Beach, 2003; D. Davies, 1998; Engeström & Cole, 1997; Engeström & Kerosuo, 2006; Tuomi-Grohn et al., 2003).

Experience, mastery, scope, and autonomy in decision-making all tend to increase as the position's working level within a hierarchy becomes more influential, thereby increasing the learner's capacity for transfer (Axtell et al., 1997). As Cheng and Ho (2001) note, workers who are confident that they can control organizational outcomes "are more likely to facilitate the application of training content on their jobs" (p. 107).

Performance expectations

Explicit performance expectations are normally embedded within position descriptions, annual and/or quarterly performance plans, competency and best practice guidelines articulated by professional associations and/or by the organization, and strategic plans that have implications for specific jobs within the organization. All of these contribute to an individual's understanding of the requirements of their position and the knowledge that they need—or will need—to accomplish it. A wealth of tacit and situated cultural expectations can also shape performance. These can include the behaviours modeled by colleagues, supervisors and be others with a shared professional identity, the directions-on-the-fly that occur in the press of daily action, the outcomes of the learners' own professional and career goals, and reflections on their practice. Explicit and tacit goals and expectations shape learning goals and contribute to learner's motivation to engage in educational activities and relate learning to practice. As Lim and Johnson (2002) observe, "while other trainee motivation variables may be uncontrollable... goal setting is regarded as the most viable variable that can be controlled during training" (p. 45). The degree to which performance expectations are monitored may also be influential. And Zareski (2003) notes that personal learning plans, as opposed to organizationally driven training

plans are “perceived as a reflection of personal goals and [are] strongly associated with increasing individual autonomy and independence from the employer” (p. 3).

Supervisory and collegial supports

Supervisory supports are seen as particularly influential in transfer since work priorities, performance and training plans, resource allocation, evaluation, feedback and rewards are all determined through formal and informal interactions between the learner and the manager (Hughes, 2004; Kirwan, 2009; Lim & Johnson, 2002; Tasse & Hrimech, 2003). Aguinis and Kraiger (2009) report that, given the proximity of the supervisory relationship, it is likely to be more influential in animating transfer than more distal organizational climate factors. As supervisors are seen to play critical roles in shaping conditions supportive of learning, Boud and Garrick (1999) state that “there is no place for managers who do not appreciate their vital role” (p. 1).

Such roles can operate at two levels. The first could offer a benignly supportive working environment that offers clarity around performance expectations along with encouragement and supports for performance development. The other could feature a more intentional and facilitative supervisory commitment to the creation of a positive transfer environment, as envisioned in the literatures of organizational learning and workforce development (Hughes, 2004; Lim & Johnson, 2002). A more proactive supervisory role also has a number of dimensions. Professional development planning which is clearly linked to workplace needs or to the employee’s career growth, sets the stage for transfer in both near and far formats. Such a deliberative approach can be further enhanced when the supervisor works with the learner to identify learning opportunities and to develop objectives and performance expectations that encourage a focus on areas of particular relevance. Involving the learner in needs assessment and educational planning is also perceived as effective (Merriam & Leahy, 2005). Post-course debriefing to jointly identify transfer opportunities is seen to be of considerable value, as is the creation of opportunities to apply learning, ongoing mentoring, feedback, and encouragement to guide the learner through the transfer process, leniency for trial and error, and evaluation that explores successes and challenges. The supervisor is also positioned to advocate for the resources and other supports needed in the introduction of new practices.

While effective supervision is broadly regarded as important in transfer, this finding is not universal. Coetzer (2007), for example, notes that the age and experience of employees impacts their reliance on supervisory supports. They find that young employees as well as older

employees who are new to an organization are likely to view supervisory supports and interventions more favourably than older, more experienced employees. Other studies do not observe a relationship between supervisory supports and transfer (Awoniyi et al., 2002; Chiaburu & Marinova, 2005; Facteau et al., 1995; Velada & Caetano, 2007). Chiaburu and Marinova speculate that this may be a function of team-based supports and strong organizational learning and transfer policies, while Awoniyi et al. note that supervisory roles in different workplace settings make it difficult to identify consistent indicators of support.

Just as the supervisor can create a positive environment, the supervisor can also create obstacles to the transfer of ideas that are perceived as inappropriate, or that do not fit within the supervisor's view of the learners' capacity, reliability or position within the organization (Kirwan, 2009; Szulanski, 1999). Kirwan suggests that unsupportive behaviours can be placed in two categories: indifference or active resistance with indifference being the more common. Lack of perceived benefit, discomfort with new practices, resistance to the increased complexity of management tasks that may result from new practices, or loss of control may lie at the heart of these behaviours.

Hughes (2004) also notes that the influence of the supervisory relationship can be variable and emphasizes that learners' willingness to seek support is a factor. His research on public sector employees working in the kinds of expansive environments described above by Fuller and Unwin points to the importance of reciprocal trust to create sharing relationships between learners and supervisors, and to the dynamics of workplace or professional identity that may limit ways in which learners seek supports. He observes generally positive supervisory relations, but notes that he had expected that supervisors would support learning, given that this is regarded as a best practice. However, "in all the interviews there was no sign of such an involvement, and no sign that the participants were seeking it. Indeed, on the contrary, the participants went out of their way to avoid it" (p. 285).

Like supervisory supports, the supportive and interdependent quality of personal affiliations with colleagues influences the likelihood of transfer (Kirwan, 2009). Lave and Wenger's (1991) influential concept of communities of practice has highlighted the integral role of collegial relations in both learning and work, even to the point of questioning the relevance of externally sourced education based on the assumption that most learning is highly situated, subjectively developed and expressed in tacit forms within such communities. More recently, Field's (2005) observations on the role of social capital in the workplace reinforce the

importance of collegial relations in working towards mutual goals. Commenting that "people's learning always takes place in a wider social context" (p. 10), Field emphasizes that learners construct and use learning in relation to those around them.

From his research on public sector employees, Hughes (2004) observes that colleagues are even more influential than supervisors in helping learners plan their learning, identify resources, and explore issues. Others observe more varied influences of peers and colleagues on learning and transfer, depending upon organizational structure and culture. As Billett (2002) notes "affiliations may determine how information is shared and with whom, how work is distributed, and how individuals' efforts are acknowledged and judged. This kind of workplace contestation seems to be an enduring feature of work practice" (p. 37). Arduous relationships create "hardship" in transfer (Szulanski, 1996, p. 36), as do relationships that marginalize certain workers, conflicting priorities, interdivisional jealousy, turf protection and poor communication (Billett, 2002; Szulanski, 1996). Workgroup climate is noted as such a strong indicator in transfer by Gilley and Hoekstra (2003) that they see it as core to research in this area.

Timely opportunities for transfer

The capacity to apply newfound knowledge and skills immediately after learning is noted as influential (Axtell et al., 1997; Broad, 2007; Curry et al., 1994; Lim & Johnson, 2002; Tasse & Hrimech, 2003). This is the point at which both enthusiasm for a concept and recall of the concepts are normally at their highest. As time passes and other priorities take precedence, the level of commitment to transfer is seen to decline as does the learner's 'retentive capacity' (Szulanski, 1999). This is aligned with the notion that near transfer tends to be easier than far transfer. Conversely, some authors note that for knowledge that requires adaptation, a period of time to reflect on a process and its relevance for the workplace is needed (Axtell et al., 1997). The dynamics of deliberately acquiring knowledge for some future application also position the learner to store knowledge away in a manner that allows them to retrieve it at an appropriate time without loss of motivation. In a study of staff in a multi-national corporation, Axtell et al. found that "transfer of training at one month was a significant predictor of...transfer after one-year and as such plays an important role in the sustained use of these skills" (p. 210).

Similarity and relevance to task requirements

As noted throughout this discussion, the degree of similarity between the situations of learning and of application is seen as key to the likelihood of transfer. This is noted by Lim

(2002) who observes that "without a strong match between the training content and trainee's work roles, it is unlike that transfer will occur" (p. 46). If the procedures and tools discussed in a classroom are identical to those used in the workplace, then transfer is near and easy. Linked with similarity is the notion of relevance (Colquitt et al., 2000). While a new practice may not be exactly similar those in the workplace, if a learner perceives it to be relevant, useful in problem-solving, appropriate to organizational culture, and/or implementable within existing expertise and resources, the task of linking it to affordances in the workplace is eased. Axtell et al. (1997) note that learners' "perceptions of the relevance and usefulness of the course and their motivation to transfer skills are key variables in determining the level of transfer..." (p. 209).

Available resources

Having the appropriate resources on hand to facilitate the implementation of new practices is an obvious influence on transfer (Awoniyi et al., 2002; Clarke, 2002; JHPIEGO, 2002). Funding, supplies, tools, equipment, appropriate team skills and structures, time and suitable working spaces all ease the transfer process, in that they enable the learner to move ahead if a new practice is seen to be relevant. The topic of resources as a factor in transfer gets little attention in the literature, despite its potential to be a deciding factor in whether or not a new practice is viable. A study by Clarke (2002) however, concludes that lack of time and workload pressures were the two major constraints inhibiting transfer in social service organizations.

Summary

The interplay among complex organizational and positional factors seems critical in determining the degree to which learning is likely to transfer in workplace settings. As Parent et al. (2007) note, the capacity of a workplace system to absorb new knowledge is a prerequisite for learning transfer. With so many factors to consider, it seems evident that substantial learning transfer in museums requires intentional and coordinated efforts on the part of organizational leadership and supervisors—and the learner—to bring appropriate conditions into alignment.

How does the Learner Shape the Transfer Process?

As noted, many scholars emphasize the important role that the individual learner plays in the transfer process (e.g., Colquitt et al., 2000; Mathieu et al., 1992). Naquin and Baldwin, writing from the organizational world for example, state that all recent reflections on learning

and transfer focus on learner characteristics as important determinants of transfer (2003, citing Baldwin & Ford, 1988). Moreover, they emphasize that "the notion that performance, in any setting, is determined by a combination of an individual's motivation and ability has been one of the most enduring conceptualizations in industrial organizational psychology" (p. 81). The actions of individuals in workplaces are shaped by both their life history and experiences within and outside the work setting. "Each individual will, therefore, exert their individual agency in terms of how far they decide to participate in (and help to shape) the opportunities that the workplace offers to them" (A. Fuller & Unwin, 2011, p. 52).

This section focuses on factors and themes that inform how my enquiry approaches the question: "how does personal agency influence museum professionals' inclination to put new learning to work?" It begins with a focus on characteristics of agentic professionals and goes on to explore the ability, capacity and motivational factors that are considered to be of importance in transfer. The section ends with a reflection on ways in which museum professionals exercise agency within the context of their work.

Agency for transfer

The influence of personal agency in transfer is embedded in Eraut's (2004) definition of transfer as "the learning process involved when a person learns to use previously acquired knowledge/skills/ competence/expertise in a new situation" (p. 212). In this view, the individual plays a central role in evaluating the utility of their learning, considering ways in which it can be appropriately applied within and through the social practices of the workplace, and developing strategies for its application. Transfer theory relating to agency draws extensively from studies and literatures that reflect on the roles of agency in learning, while a handful of studies and conceptual analyses take a more focussed look at its specific role in the transfer process (e.g., Bereiter, 1995; Billett & Smith, 2006; Chiaburu & Marinova, 2005; Gegenfurtner et al., 2009b; Leberman et al., 2006; Marx & Burke, 2003; Pugh & Bergin, 2006).

Human agency is a social-cognitive concept that is discussed and valued well beyond the literature of transfer. As Bandura (2001) affirms, "the capacity to exercise control over the nature and quality of one's life is the essence of humanness" (p. 1). He goes on to state that "to be an agent is to intentionally make things happen by one's actions" (p. 2), and adds that if individuals are to successfully negotiate "a complex world full of challenges and hazards, people have to make good judgments about their capabilities, anticipate the probable effects of

different events and courses of action, size up sociostructural opportunities and constraints, and regulate their behavior accordingly" (p. 3). Bandura suggests that agency has the following core features, each of which can be seen as important in the knowledge and skills used in transfer:

- Intentionality: a proactive commitment and plan of action to make something happen. Bandura distinguishes between intention and outcomes, noting that "outcomes are not the characteristics of agentic acts; they are the consequences of them" (p. 6).
- Forethought: the process of setting goals and expectations, anticipating implications, and formulating a course of action that helps to motivate and guide learning actions.
- Self-reactiveness: self-regulatory processes that enable the learner to monitor his/her behaviour in the context of environmental conditions and to align performance with morals, goals and standards.
- Self-reflectiveness: "the metacognitive capacity to reflect upon oneself and the adequacy of one's thoughts and actions is another distinctly core human feature of agency" (p. 10). This is likely to involve self-reflection on efficacy and capacity in exercising control over their functions and their environment. Perceived self-efficacy, as an element of self-reflectiveness, is seen to be pivotal since it influences whether "people think pessimistically or optimistically and in ways that are self-enhancing or self-hindering" (p. 10). Bandura goes on to note that "efficacy beliefs play a central role in the self-regulation of motivation through goal challenges and outcome expectations. It is partly on the basis of efficacy beliefs that people choose what challenges to undertake, how much effort to expend in the endeavour, how long to persevere in the face of obstacles and failures, and whether failures are motivating or demoralizing." With specific reference to contemporary occupational settings in which knowledge and skills needs change rapidly, Bandura observes that "workers have to take charge of their self-development for a variety of positions and careers over the full course of their worklife. They have to cultivate multiple competencies to meet the ever-changing occupational demands and roles" (p. 11).

Agency is generally addressed at the individual level. However Bandura also notes that it can occur by proxy when an individual seeks to influence another to achieve desired goals. This approach is of particular value when one lacks the expertise, energy or resources to assume responsibility for a task. Another level at which agency operates is through collectives, including

teams, or entire organizations. As Bandura indicates, it is likely that individual, proxy and collective levels of agency are at play at any given time, given that “human functioning is rooted in social systems” (p. 14).

The role of agency in transfer is discussed by numerous scholars. Billett (2009), for example, emphasizes the importance of workplace and educational efforts to develop ‘agentic’ professionals who are strategic, reflective and proactive as they putting new learning to work. The importance of nurturing a ‘disposition’ for transfer is echoed by Alexander and Murphy (1999) who contend that transfer is facilitated when learners have “a rich and cohesive body of domain knowledge, a well-honed strategic repertoire, as well as a personal investment in or identification with an academic domain” (p. 571). Kirwan (2009), writing from a corporate perspective, notes that "...activities such as goal setting, self-management and coaching are all regarded as important elements in generating the time and mental space needed to establish new behaviour following a training or developmental experience.” He goes on to observe that “it would appear that those who score highly on ability to transfer are those who have:

- motivation to transfer
- the ability and/or opportunity to reflect on learning, including new knowledge, skills or other learning, in order to see how that learning can be used [perceived content validity and affordances]
- competence in goal setting and self-management
- assertiveness, and being able to say 'no' when necessary
- autonomy in their jobs, and being able to use it 'to make things happen’ (p. 102).

While there is general agreement that personal factors are highly influential in transfer, ways in which they are categorized and described by transfer scholars vary according to areas of research interest, although most distinguish between factors linked with ability and motivation. In the absence of a commonly accepted typology, the following is a compilation that integrates various factors that, in my view, contribute to a person’s agency in learning to transfer content from continuing professional education.

- Ability Factors
    - cognitive ability
    - learning mastery
- Capacity Factors
    - positional autonomy

    - perception of affordances
- Motivational Factors
    - disposition
    - self-efficacy
    - personal and professional values, goals and rewards
    - autonomous motivation and initiative
    - professional, job and/or organizational affiliation

Ability factors

A learner's ability to engage in learning processes that result in transfer is related, in part, to personal mastery of content in a manner that enables it to be put to work. The influence of mastery on transfer can be looked at from two perspectives: the learner's cognitive abilities, as well as the learner's position along a continuum from novice to expert.

Cognitive ability

Intelligence and cognitive frameworks clearly determine how the learner engages with content, understands its complexities and relations, and relates it to practice. As Pugh and Bergin (2006) note, "cognitive engagement encompasses a set of factors that, theoretically, support conditions needed for transfer. These include depth of processing (e.g., focus on conceptual understanding over rote memorization), use of learning strategies likely to promote connected knowledge structures, and engagement in meta-cognitive activities" (p. 148). While influential (Colquitt et al., 2000), cognitive ability is beyond the scope of this study to investigate and analyse, given the specialized and complex nature of the topic. Beyond selecting case participants who have achieved good grades and have been successful in acquiring and holding responsible museum positions, this particular factor is not explored, except as participants offer perspectives on their abilities in this area.

Learning mastery

Considering the implications of learners' levels of expertise on transfer, however, is somewhat easier since it relates to both the amount of experience a learner brings to work and to their level of comfort in applying content. Central to viewing mastery as a variable influence is the concept of learning as a constructive process in which learners evaluate the meaning and relevance of new knowledge on the basis of personal experience (Cree & Macaulay, 2000).

Increasing experience provides an expanding context in which to consider the utility of learning. As Billet (2010) notes, "what will be for one worker a novel work task from which she/he might learn new knowledge and categories of knowledge, might be quite familiar for another worker.... So, there will be distinct kinds of processes and outcomes arising for each of these workers engaging in the 'same' task" (p. 13).

The notion of a continuum from novice to expert is useful as it tends to parallel individuals' work trajectories and developmental stages. A classic model posed by Dreyfus and Dreyfus (1980) and widely discussed in the literature of expertise, emphasizes that that rule-based practice that is grounded in the kinds of conceptual and procedural knowledges gained through study or through more tacit workplace norms, can only take a learner to the competency stage. To achieve proficiency, then expertise, a learner must develop strategic knowledge and the breadth of conceptual, procedural and situated knowledges—largely gained through informal learning—needed to act in intuitive, situational, and goal-focussed ways that discriminate among options without reference back to rule-based systems. In a 2005 discussion of their theory of expertise, Dreyfus and Dreyfus note that "the student, who has mastered the material, immediately sees the solution to the current problem" (p. 788). While this is not directed specifically at transfer, the link is an obvious one.

The following synopsis of the Dreyfus and Dreyfus levels is offered by Eraut (1994, p. 124) in his discussion of the development of professional knowledge and competence:

- **Level 1: Novice:** rigid adherence to taught rules or plans; little situational perception; no discretionary judgment.
- **Level 2: Advanced Beginner:** Guidelines for action based on attributes or aspects (aspects are global characteristic of situations recognizable only after some prior experience); situation perception still limited; all attributes and aspects are treated separately and given equal importance.
- **Level 3: Competent:** coping with crowdedness; now sees actions at least partially in terms of long-term goals; conscious deliberate planning; standardized and routinized procedures.
- **Level 4: Proficient**: Sees situations holistically rather than in terms of aspects; sees what is most important in a situation; perceives deviations from the normal pattern; decision-making less laboured; uses maxims for guidance

- **Level 5: Expert:** no longer relies on rules, guidelines or maxims; intuitive grasp of situations based on deep tacit understanding; analytic approaches used only in novel situation or when problems occur; vision of what is possible.

In addition to providing a useful continuum that helps to identify levels at which CRM program graduates are functioning, this listing is useful in predicting learners' ability to undertake the learning process inherent in transfer itself, particularly as 'far' transfer requires the adaptation of learned knowledge and skills to new situations.

To a certain extent, the mastery continuum echoes adult learners' developmental stages as they move through careers and assume increasingly expert and responsible roles (Daley, 1999). Like other influential variables, development is itself a broad, complex and subjective dynamic that influences individuals' life and career trajectories in varied ways. Biological perspectives on aging suggest that people experience physical and psychological changes as they age, while psychological perspectives focus on a series of life stages that begin with adolescence and move through increasingly mature phases. Socio-cultural perspectives focus on social roles as shaped by societal expectations that, to some degree, are age-normative (Merriam et al., 2007). While critics suggest that such perspectives impose a linear and invariant framework on analyses of development and call for an approach that acknowledges contextual influences (Patton & McMahon, 1999), the notion that workers move through somewhat predictable phases in their working life as they progress from novice to expert suggests that they will approach transfer in different ways at different career points, depending upon their strategic knowledge, their levels of confidence and commitment, and the factors that motivate learning and performance.

In the absence of individual accreditation for most aspects of museum practice that might align required levels of knowledge with increasingly demanding professional positions, recognition of a learner's developmental phase and position on the Dreyfus and Dreyfus (1980) mastery rubric provides a useful guideline for what is ultimately a subjective observation of expertise. People enter the museum field with diverse prior education and experience based on hiring decisions that are linked with specialized functional requirements, budget capacity, and availability of skills sets in the market place. While they may have extensive knowledge and skills in specialized areas, their level of expertise on the job is determined, to a large degree, by the match with position requirements as practice evolves. Workers "may function at a relatively high level of competence for a period of time, then as some change is introduced, their level of

competence drops to a much lower level, requiring some time and effort to regain their previous status" (Jacobs & Park, 2009, p. 135). For example, an expert curator who moves into management is likely to shift positions on the continuum until new knowledge enables him/her to perform in a proficient or expert manner. Mastery of the range of complex skills inherent in positions is an ongoing challenge for museum workers, particularly as they progress to more senior levels (Lang et al., 2006).

Capacity factors

Distinct from but related to learners' abilities for transfer, is their situational capacity of to devote time, effort and resources to transfer (Awoniyi et al., 2002). As Kirwan (2009) notes "a recent study...would seem to suggest that the single most important characteristic [in a person's capacity for transfer] is…making the 'time and space' to enable transfer" (p. 101). Learner's positions in museums, their scope of influence, and their ability to make decisions to devote time and energy in busy and under-resourced environments, can all be seen as instrumental at the individual level in facilitating or deterring transfer. Capacity is directly linked to the learner's level of positional autonomy and locus of control, as well as his/her capacity to identify strategic opportunities for the use of new knowledge and skills.

Positional autonomy

Autonomy of practice may be seen as a position along a continuum from other-directed to self-directed, and relates to the degree of freedom or the expectation within an individual's job to exercise independent decision-making. It plays a range of important roles in the lives of professionals and their power to influence transfer (Axtell et al., 1997). "...professionals have held a privileged, almost sacred, role in society. Professionals are 'supposed to be' more knowledgeable, ethical, socially-oriented, and independent in their judgment than are non-professionals" (Morris Baskett & Marsick, 1992, p. 1). Cranton (1996) citing Candy (1991), suggests that individuals are autonomous to the extent that they:

- conceive of goals and plan independently of pressure from others;
- exercise freedom of choice in thought or action;
- use the capacity for rational reflection to make judgements on the basis of morally defensible beliefs, as objectively as possible and uses relevant evidence;
- have the will and capacity to carry out plans of action;

- exercise self-mastery in the face of reversals, challenges and setbacks; and
- have a concept of himself or herself as autonomous (pp. 56-57).

While this is a generalized listing that relates to both positional and personal autonomy, it demonstrates that autonomous workers hold many of the goal setting, mastery, self-reflection and persistence characteristics that are seen to be important in agency for transfer. These qualities are noted by Broad (2005), who states that autonomous workers tend to evaluate their abilities, set their own performance specifications and develop resources and supports. As well, "...they are quite likely to make their own determinations on the skills and knowledge they need to perform capably" (p. 44). She lists factors that support autonomous workers' engagement in transfer processes:

- Credibility: new knowledge and skills seem logical, examples are convincing, they are used by respected colleagues, they seem effective.
- Practicality: new approaches seem clear, reasonably operational, and easy to apply
- Recognized need to improve own performance: new approaches would help achieve a goal, solve a problem, or improve performance (p. 46).

Within the context of the workplace, positional autonomy is further defined by the individual's scope of influence and decision-making ability, and to a certain extent, their position on the continuum from novice to expert (Axtell et al., 1997). For example, in a small museum, a sole but highly experienced curator will exercise considerable decision-making autonomy in the execution of tasks associated with collections development and presentation—and in the introduction of related practices. In a larger museum, a curator's sphere of influence might be limited to a particular collecting area and their capacity to introduce new practices may be subject to the adaptation of institutional policies that balance competing curatorial interests. In her study of social workers, Daley (2005) found that "the level of independence, autonomy and freedom the professional has to move within and around the organization structure determines the learning and the use of information in practice" (p. 85).

Reputation and trustworthiness within the organization are also seen to influence autonomy and the capacity for transfer. Demos (2003) comments that some museums feature a "culture of professionals" (p. 31) that tends to privilege such groups as curators, and calls for "further work to ensure parity of esteem" (p. 30). Lucas (2005) suggests that others' perceptions of learners' accumulated experience, status within a group, or competitive edge influence capacity to influence transfer. He finds that trust that is grounded on experience is important in

the transfer process, particularly as it allows for positive interactions with colleagues. This is also seen to be a reciprocal effect, in that the learner must also trust and respect the recipients of new knowledge in order to engage in a transfer process. Eraut (1994) indicates that specialized professional expertise carries with it a sense that the professional is trustworthy and powerful. "The traditional ideology of professionalism uses the notion of specialist expertise to justify the assumption that only the professional can determine the real needs of the client" (p. 5). In the context of this study, the client could be the object, the community, or the museum itself.

While autonomy may be conferred by the nature and scope of one's position, it is accompanied by the expectation that autonomous professionals will have well-developed strategic self-regulation skills to fulfil independent and often lightly supervised roles—and to put newfound learning to work. As capacity for self-reflection is seen to be most fully developed at the proficient and expert levels noted above, this also suggests that museum workers performing at the novice level are less likely to have a well developed sense of positional autonomy and capacity for appropriate transfer than their more experienced colleagues. "Being able to reflect on what you learn on a program and making changes to your behaviour is seen as an important part of making the training work" (Kirwan, 2009, p. 103). The importance of self-reflection was first emphasized by Schön whose seminal work on concepts of reflection-for- and in-practice and on theory-in-action has provided the basis for extensive theorizing about the nature and efficacy of the reflective practitioner (Schön, 1983, 1987). These ideas are related to the museum field by Teather (1991), who observes that "many practitioners in fact often demonstrate a striking ability to reflect on their intuitive knowledge in the midst of action and draw on this for exceptional decision-making requirements in their job" (p. 410). She suggests that at the heart of an integrative and holistic approach to museum practice is professionals' capacity for critical and reflexive thinking-in-action within a broad professional context.

The degree to which an individual exercises judgement in specialized professional interventions also influences how positional autonomy influences the transfer process. This is not an area in which extensive research has been conducted. Yelon and Ford (2004), for example, note that most research on transfer has focussed on supervised workers, and comment that their research on autonomous physicians was undertaken as they "felt that the dynamics of transfer, in general, and the motivation to transfer, specifically, may be quite different for heavily supervised compared to relatively autonomous workers" (p. 83). Depending

upon the size of a museum and the expertise of supervisors in specialist areas of practice, this seems likely to be an influential factor in positional autonomy around transfer.

Positional autonomy is closely linked with locus of control which Eddy and Tannenbaum (2003) describe as the "generalized expectancy that organizational outcomes are controlled either by an individual's own actions (internal) or by other forces (external) …Individuals with an external locus of control can have lower motivation to attend training and may be less likely to apply new knowledge or skills on the job" (p. 169). As Axtell et al. (1997) note, "those who have more control over the way they work may find they can create more opportunities to use new skills than those who have less autonomy in their jobs" (p. 210).

Perception of Affordances

A related dimension of capacity for transfer is the learner's perception of opportunities—or affordances (Gibson, 1986)—for the application of new knowledge. A number of authors view learners' capacity to recognize the fit between new learning and organizational needs as crucial (Billett, 2002; Detterman & Sternberg, 1996; Greeno et al., 1996). "For an activity learned in one situation to transfer to another situation...the second situation has to *afford* that activity and the agent has to perceive the affordance. In many cases, a situation affords several different kinds of interaction that are all regarded as successful performance" (Greeno et al., 1996, p. 102, my italics).

Capacity to recognize affordances for transfer has a number of dimensions. One is seeing opportunities for transfer that are on-hand at the time of learning. In a recent study of managers in training, Nikandrou et al. (2009), for example, find that a significant proportion of learners who do not perceive opportunities to apply their learning at the time that they participate in educational activities do not set transfer goals, and they note the importance of pre-training goal setting to clarify work-related training expectations. Another dimension involves anticipating unknown opportunities for forward-reaching transfer. Simons (1999) notes that learners involved in educational activities that address content that is not directly relevant or similar to the workplace confront a challenge in preparing for situations in which transfer *could* occur, given that "there are so many dimensions in which situations differ (time, place, content, culture, mood, etc.)" (p. 580). He goes on to question how learners can best prepare for potential future applications of learning and to comment that "the only two things a learner

can do is to strive for real and deep understanding (optimizing the accessibility of the knowledge) and to collect knowledge about the situational conditions" (p. 580).

Motivational factors

Even if the learner has ability and capacity to animate transfer, without motivation to do so, it seems unlikely that learning will be effectively applied. Motivation, defined as "the process of instigating and sustaining goal-directed behaviour" (Schunk, 2004, p. 329), is seen to be intrinsic. "The learner has an innate propensity to seek knowledge about the world" (Cree & Macaulay, 2000, p. 5). Motivation is a complex topic that is closely linked with learning and is discussed in a multi-faceted literature concerned with "the relation of beliefs, values, and goals with action" (Eccles & Wigfield, 2002, p. 110). For the purpose of this study, discussions of the separate but interconnected factors that are seen to be influential in motivating transfer are drawn as far as possible from the transfer literature and relate specifically to ways in which the determinants of motivation (described below) contribute to the likelihood of transfer. Colquitt et al. (2000) in their meta-analysis of the "burgeoning literature" (p.702) of motivation for learning, and by extension for transfer, note that while considerable research has been conducted on models and predictors of transfer motivation, there is a lack of "convergence and clarity regarding which specific factors can be leveraged to improve it" (2000, p. 678). As Egan, Yang and Bartlett (2004) point out in the HR literature, "although motivation to transfer learning has been emphasized by scholars as important to the success of organizational learning, performance, and investment, the current research on motivation to transfer is limited (p. 280, citing Salas & Cannon-Bowers, 2001). Gegenfurtner et al. (2009) echo this and comment that there is a tendency in the transfer literature to study motivation as a single construct that is grounded in expectancy theory, rather than as disparate group of factors that contribute to transfer motivation. Other authors are more inclusive of their discussion of motivation and suggest that the following dimensions impact motivation to transfer, although no single model that integrates all factors emerged.

Disposition

A disposition for transfer is seen to be a key element in the process of learning to apply new learning. As Naquin and Holton (2002) observe, disposition is comprised of "an individual's personality, which is made up of traits, affective (mood) structures, and values. Personality influences attitudes. Attitudes in turn, affect motivation, which then leads to behavioural

outcomes" (p. 358). Their research finds that dispositional effects are important predictors of both motivation to learn and to transfer, and the three strongest predictors of such motivation are conscientiousness, agreeableness, and positive effectivity (extraverted, optimistic). Colquitt et al. (2000) also note the key role of aspects of personality including conscientiousness, achievement motivation, anxiety, playfulness and need for dominance, and comment that "personality is found in many motivation theories, because it creates differences in self-set goals and the cognitive construction of individuals' environments, both of which go on to create between-person differences in behaviour" (p. 679).

Self efficacy

As Bandura (2001) emphasizes above, perceived self-efficacy plays a pervasive role in building the learner's comfort with and commitment to taking intentional action. It therefore follows that self-efficacy is instrumental in transfer (Colquitt et al., 2000). In transfer contexts, "...self-efficacy usually refers to confidence in the ability to do or learn a skill that can transfer to another domain" (Pugh & Bergin, 2006, p. 153) and positive self-efficacy is seen to contribute to the use of effective learning strategies, self-monitoring and self-evaluation practices, cognitive engagement, and effort, resilience and persistence even in the face of initial failure (Axtell et al., 1997). While research indicates that a high sense of self-efficacy contributes to motivation to learn and to transfer, Chiaburu and Lindsay (2008) find that learners must also have a high sense of the instrumentality and relevance of their learning to engage in a transfer process. Pugh and Bergin also emphasize the interrelationship of persistence and self-efficacy. They describe a range of studies that demonstrate the influential role of persistence in learning, relate this to transfer, and note that "students with high self-efficacy may persist at transfer tasks and ultimately achieve greater success at transfer than students with low self-efficacy" (p. 153). Colquitt et al. (2000) observe that post-training self-efficacy, based on increased confidence derived through acquired knowledge and skills, is influential in transfer. The role of increased self-efficacy underscores the importance of such "non-behavioral or cognitive factors" as "team commitment and coordination, acceptance of technology, customer focus, and willingness to work in a self-directed fashion" and recognition of contextual influences (p. 701) as training outcomes.

Personal and professional values, goals and rewards:

A range of scholars indicate that the more focussed the learner is on achieving personal or professional goals, the more likely they are to be motivated to learn and apply learning in an agentic manner (e.g., Chiaburu & Marinova, 2005; Facteau et al., 1995). Pugh and Bergin (2006) for example, note that "a core aspect of intentional learning is that the individual must be actively pursuing a goal" (p. 155)**.** Such goals, defined as "that level of performance the individual is trying to accomplish" (Yamnill & McLean, 2001, p. 199), might be framed by an interest in the mastery of knowledge to achieve deep understanding, or by a desire for recognition resulting from performance (Yelon et al., 2004) that might involve a more surficial level of comprehension (Eraut, 2004). While both mastery and performance orientation can lead to advancement in a career or the resolution of a work-based problem, research indicates that mastery-oriented learners who appreciate the underlying purpose and meaning of a domain will use more effective learning strategies, exhibit greater persistence, and be more successful in the transfer process (Yelon et al., 2004) than learners whose goals are performance-oriented. The identification of goals that relate to both personal and professional achievement is intimately linked with self-efficacy. "Perceptions of self-efficacy affect one's tendency to adopt goals, persist in action toward those goals, develop effective attitudes toward goal attainment, and actually achieve goals" (Pugh & Bergin, 2006, p. 153).

The presence of goals is seen to influence transfer in two ways. The formulation of learning objectives as the learner engages in an educational activity is positively related to the acquisition of new knowledge and skills (Chiaburu & Marinova, 2005; Zakreski, 2003), just as the presence of related goals associated with work performance and task completion is seen to enhance transfer. As Lim (2002) concludes from research in this area, "it appears that the transfer variable of goal setting is tied to both the personal characteristics of the trainee and his or her organizational or job requirements" (p. 45). Billet (2008) cautions that the process of goal setting may highlight divergent personal and organizational goals that impact likelihood of transfer. "Such areas of tension are likely to remain as key elements in the negotiated and contested participatory practices of the workplace and what constitutes its curriculum" (p. 122). The degree to which learning is linked to longer-term personal advancement as opposed to short-term job utility can also impact the learner's motivation to transfer (Nikandrou et al., 2009; Zakreski, 2003). Nikandrou et al. did not find an automatic relationship between motivation to learn and motivation to transfer in situations where job utility was not a strong

factor and recognized that, in their study, personal goals for career advancement were sufficient motivation for educational participation.

An under-researched aspect of personal and professional goal setting is the role that emotional and intellectual investment in a career plays in developmental as well as transfer activity. Beatty (2011) and others (V. Tran, 1998), observe that research in learning for the workplace avoids affective factors "partly due to Western society largely ignoring emotional meaning-making as a worthwhile endeavour" (p. 343). Nevertheless, Sié and Yakhlef (2009) contend that "passion is a driving force for pursuing expertise, transferring it and safeguarding its continuity" (p. 184) and suggest that "passion for knowledge is necessary in order to mobilize one's energies and the means these require for maintaining a deep, enduring commitment to one's intellectual and professional progress" (2009, p. 183). The frequent observation that museum workers are passionate about their work (E. Bailey, 2006a; Suchy, 2004; Weil, 1988; Woollard, 2006) suggests that this area is important for exploration with reference to transfer.

Perceptions that transfer will result in personal and career benefit are also seen to increase motivation to apply new learning (Gegenfurtner et al., 2009a; Yamnill & McLean, 2001). This is consistent with expectancy theory which indicates that the ways in which people value a process and anticipate success will determine their choices and levels of persistence and performance (Eccles & Wigfield, 2002). Expectation of both intrinsic and extrinsic benefits from transfer may be influential. Intrinsic value is the satisfaction derived from performing an activity or from an interest in a subject. Extrinsic value can involve tangible recognition including praise, feedback, increased compensation or other forms of recognition. Utility value is also influential to the degree that a task relates to current and future personal, professional and workplace goals (Eccles & Wigfield, 2002).

Autonomous motivation and initiative

Autonomous motivation to transfer is defined as "an internalized desire to transfer learning that is initiated and governed by the self" (Gegenfurtner et al., 2009a, p. 126). This differs from the notion of positional practice described above, in that it is not directly linked to, or prescribed by, the scope of job-related decision-making. Instead, autonomous motivation relates to an individual's self-determined volition to learn new concepts and find applications in the workplace. In a study focussed on health and safety professionals, Gegenfurtner et al. (2009) observe that antecedents to autonomous motivation to transfer include a positive attitude

toward content and satisfaction with the training event. They also note autonomous and controlled motivations can co-exist, depending upon the learner's circumstance and conclude that "that trainees have a more complex motivational profile than previously indicated in studies using a one-dimensional scale of transfer motivation" (p. 134). The list of indicators of autonomy, noted above by Cranton (1996) are also relevant in this factor.

Separate from, but related to, autonomous motivation is the degree of initiative that the learner brings to efforts to apply learning. Initiative involves "…a self-starting, active and persistent approach to work. Additional aspects of the concept are that this behavior is consistent with the organization's mission, [and is] goal-directed, and action-directed…" (Frese, 2001, p. 100). By 'self-starting', Frese et al. (2007) mean that behaviours are regulated by goals that have been developed "without external pressure, role requirements, instruction or 'obvious' action," and they go on to state "thus, personal initiative is the pursuit of self-set goals, in contrast to assigned goals" (p. 1085). Frese et al. also indicate that initiative is characterized by proactive behaviours that are aligned with Bandura's (2001) emphasis on forethought as a key component of agency. Forethought enables people to "motivate themselves and guide their actions in anticipation of future events… In this form of anticipatory self-guidance, behaviour is motivated and directed by projected goals and anticipated outcomes rather than being pulled by an unrealized future state" (p. 8).

No studies that link initiative (independent from motivation) specifically to transfer were located. However, research undertaken by Frese et al. supports predictions by Bandura (1997) that work characteristics are reciprocally determined by individuals with a high degree of control orientation that is supported by initiative and self-efficacy. Like many elements of agency, initiative is integrally linked to an intentional approach to learning that, by extension, seems positively linked to agency for transfer. Learners who demonstrate initiative may be proactive in identifying affordances for the use of learning. Yelon et al. (2004), writing about transfer from continuing professional education, comment that some workers identify new practices in the classroom and search for opportunities to apply them upon return. "Is this an opportunity to apply the idea I've intended to use? Where in my work might I use this idea?" (p. 99). They call this "opportunity seeking" and link it to the notion of forward-reaching transfer which involves conscious intention to apply an idea at some future point.

Job, organizational and/or professional affiliations

The degree to which learners feel connected and valued within the professional domain and/or the workplace and to which they ascribe to the values and goals of their organization or profession can affect commitment to learning and transfer (Billett & Smith, 2006; Colquitt et al., 2000; Daley, 2002; Gegenfurtner et al., 2009a). As Fenwick (2008) notes, "work communities are powerful sites of identity, where individual workers' desires for recognition, competence, participation, and meaning are both generated and satisfied" (p. 22). She indicates that the process of 'identity work' involves learning, and is linked with ways in which an individual perceives and values both explicit and tacit ways of knowing, as well as ways in which they understand that their knowledge is valued in the group. Billett and Smith (2006) also observe the importance of professional and/or organizational identity in saying ways in which individuals present themselves and ally with social practices such as work determine how they engage in intentional activities, including learning. Specialized professional identity and status, for example, are seen by Murtonen et al. (2008) to lead to high task orientation, as a means of individually or collectively resolving work-related problems. Bailey (2006a) notes that museum educators tend to be members of multiple communities of practice that:

> ...engage their learning, stimulate and help them make connections among ideas; permit and facilitate dialogue with its members; help them define what they do and believe; provide support; give them access to a shared repertoire of practice; and allow them to contribute to the community's evolution. (p. 194)

In addition to a positive view of work, the breadth of an individual's view about their role orientation is seen to be influential in defining, perhaps limiting, learning and application. "It has long been observed that employees can hold restrictive views about their roles; a phenomenon described as the 'job myopia' or 'that's not my job' syndrome.... Such a narrow and passive role orientation is assumed to impair performance and inhibit receptivity to change" (Parker, 2007, p. 403). Parker finds "that employees' flexible role orientation affects their job performance, especially in high autonomy situations" (p. 424), and observes that employees with high scores on flexible role orientation "are likely to perform effectively because they will proactively engage in emergent tasks over and above their established tasks in order to solve problems and pursue improvements in domains beyond their immediate job" (p. 409).

While positive and flexible affiliation is seen to increase the likelihood of learning and transfer as a means of benefiting the organization, a positive affiliation with a broader

professional identity may also have the same effect, independent of a sense of commitment to the workplace. Colquitt et al. (2000) note the importance of a commitment to career exploration, saying that "self-assessment of skill strengths and weaknesses, career values, interests, goals, or plans, as well as the search for job-related information from counsellors, friends, and family members...helps individuals identify their strengths, weaknesses, and interests" (p. 679). This is linked to an ethical commitment to learning and best practices as a key element of professional identity, particularly when an autonomous professional, such as a conservator or a collections manager, is largely accountable for decision-making within the particular specialism.

Museum workers as agentic professionals

As Billett (2009) notes, the capacity of 'agentic' professionals to be proactive, adaptive, reflective, and strategic enables them to negotiate meanings, to bring critical insight to the relevance of content, and to move from classroom to practice settings. While these qualities are acknowledged as desirable in the museum sector by many authors (e.g., Janes, 2009; Macleod, 2001; Suchy, 2004; Teather & Carter, 2010), few studies contribute to a useful profile of the characteristics of the museum labour force, and views on the strengths of museum workers as agentic professionals are grounded in observation and conjecture.

In Canada, an influential empirical study of museum workers was conducted in the 1980s (Ekos, 1988). While the data are dated and reflect the realities of the generation of museum workers who are now approaching retirement, this study highlighted the challenges inherent in preparing a workforce to meet the needs of small and large museums with diverse specializations. Another study in the same period on mid-career learning noted difficulties in finding senior managers for position openings and suggested that this could be linked to weaknesses in training programs (Jolliffe, 1984). Research on the museum workforce was also undertaken in 2004 as part of a larger survey of the library and archival sectors (8Rs Research Team), but since the museum response rate was low[7] and considered to be unrepresentative, the results have not been disseminated.

The Cultural Human Resources Council (CHRC, 2004) notes the cultural sector in Canada more generally is "under-documented and under-represented in official statistics and labour-

[7] The 8Rs Research Team (2004) attributes low museum response rates to the likelihood that "overworked and underpaid" museum directors had little time to contribute to its survey (p. 164) .

market studies" (p. 10). CHRC statistics and reports blend museum information with data on the performing arts and creative arts, libraries and archives, making it difficult to extract museum-specific workforce characteristics. Observations from this study that offer insight on museum sector workforce characteristics suggest that:

- those involved in culture-based occupations tend to be highly educated, but have low financial remuneration, particularly in small and not-for-profit organizations;
- culture-based occupations are not well-understood by the general public;
- the workforce is widely dispersed and involves a complex range of specializations;
- a "weak culture of human resources" impacts institutional commitment to lifelong learning and employee development;
- high levels of part-time and seasonal employment inhibit the continuity of careers;
- visible minorities are under-represented in the cultural workforce;
- women make up a high proportion of the cultural heritage workforce;
- there is a need for further development of management skills; and
- there is a limited infrastructure that supports training.

CHRC also reports that the cultural workforce can be plagued by poor working conditions, instability, frequent turnover, lack of succession planning, and lack of professional development opportunities. CHRC observes that while preparatory training for the cultural sector is "quite good" the workforce lacks "the ability to integrate these skills into…the workforce to establish a career" and needs "to expand these skills over the course of a career to accept broader and increased responsibilities" (p. 21). While the CHRC report does not specifically express a concern about transfer, it observes that "resources spent on training do not yield satisfactory results" and notes "a perceived lack of the value of training in the eyes of management" (p. 22). This report indicates that over one-third of the labour force surveyed expressed dissatisfaction with support for training and identified lack of time and money as obstacles for participation.

Useful data from Statistics Canada (2008) indicates that salaries, wages and benefits were the largest expenditure in the budgets of museums, galleries and heritage sites in 2007, absorbing 43% of operating revenues . They also note that this figure does not account for the donation of time from numerous volunteers. Further afield, *The Cultural Heritage Blueprint* (2008) offers a somewhat similar profile of British museum and heritage workers:

> ...the workforce is predominantly white with a small majority of female workers. The workforce is highly qualified, with 50% educated to Master's degree level or above. The

> sector is reasonably small and the number of job vacancies is limited. This means getting into the sector can be difficult, especially as the turnover of staff is relatively low, although short-term contracts have increased this. The sector suffers from low levels of pay. (Section 2.5)

Despite concerns about working conditions in the museum/heritage workforce, more qualitative efforts to describe this group emphasize the qualities that draw people into museum practice and contribute to the quality of working life. Weil (1990) notes that:

> …compensation does not appear to be the driving force behind [museum workers'] choice of occupation. Whereas they may well be other occupations—banking, advertising, and insurance, for example—in which employees who positively dislike what they do nonetheless "can't quit" because they need the salary or security that their jobs provide, American museum work, in general, neither pays enough or offers enough tenured positions to keep many people who would rather be doing something else. In fact, one of the things that makes museum association meetings so exciting—it may even be why we have so many of them—is the opportunity they offer to be together with other people who are so genuinely interested in and enthusiastic about what they do. American museums are, for the most part, remarkably pleasant places in which to work. (p. 77)

A passion for museum work is noted by other authors (e.g., Bailey, 2006b; CMA, 1995a; M. Davies, 2007; J. Davis, 2001; Eisner & Dobbs, 1986; Glaser & Zenetou, 1996; Janes, 2009; Matelic, 2007; Schlatter, 2008; Suchy, 2004). This suggests that many in this sector will be intentional in their effort to learn for improved practice. Other characteristics that may impact museum professionals' agency for transfer include:

- Multiple paths into and through the sector (Bailey, 2006b; J. Davis, 2001) and varied goals and sources of career satisfaction that suggest mixed motivations for learning and transfer.
- An altruistic sense of public duty and a commitment to the creative and social work of the museum (Kavanagh, 1994; Weil, 1988), along with an appreciation of making a meaningful contribution (Bailey, 2006b) that suggests that a disposition and strong (if varied) intrinsic motivations to learn are influential in enhancing performance.
- A strong commitment to working with objects and/or with people—or both—(Schlatter, 2008; Suchy, 2004) along with "wide-ranging curiosity about many things" (Bailey, 2006a, p. 182) that is likely to contribute to intrinsic motivation to learn and transfer.

- An inclination to consider museum work as a vocation—as opposed to a job (Bailey, 2006a)—that further reinforces motivation to learn.
- Comfort in working in a high paced environment (Bailey, 2006a) with multiple demands and limited resources that may impact capacity for introducing new practices.
- A high degree of specialist knowledge in either museum studies or a related discipline—or both, described by Weil (1996) as "hyphenated" interests (p. 64). The degree to which workers identify with disciplinary and/or museum roles may determine their inclination, goals, and approach in engaging in learning and transfer. Conservators, archaeologists, marketers and educators, for example, may find greater personal and professional support for practice within special interest groups, and are likely to be influenced by these frames of reference in transfer rather than by a more general identification with museum workers.
- A commitment to established best practices that encourages continued learning to develop competence, and may limit perceptions of affordances for alternative or innovative approaches. For example, from research on change processes in museums, Sandell (2003) observes that participants "identified the need for a radical shift in the values and attitudes of all staff working in the sector. Though there is increasing recognition of the need to diversify and broaden audiences there remains a resistance to the notion that museums have a social impact beyond their educational role" (pp. 53-54). He notes that while some employees may resist the notion of inclusion, others are simply not familiar with process and practices for inclusion. "Staff training and development that will develop amongst all museum workers both an ethos of social responsibility and the tools, skills and knowledge to begin to work in an effective way, is needed to help to effect wider change" (p. 55).
- A capacity for self-direction, and observational abilities, and tolerance for change (Bailey, 2006a) and ambiguity (Matelic, 2007) which highlight the importance of strategic knowledge and capacity for initiative and perceptions of affordances.
- Membership in multiple communities of practice within the museum, across communities, as well as in a personal , scholarly and/or external professional lives (Bailey, 2006a).

- A significant degree of positional autonomy for workers in stable positions, particularly in smaller institutions with few colleagues with similar duties (Bailey, 2006a). While autonomy is positively linked with transfer, the sense of isolation that can be experienced when a worker is not closely connected with collegial or learning supports may also impact inclination to engage in learning (J. Davis, 2001) and transfer processes.

These characteristics cannot, of course, be seen as universal and their potential influence on agency for transfer will vary with the learner's background, interests, level of engagement, and personal and career identity and goals. For example, Suchy (2004), in her research on exemplary leadership qualities for art museums, observed that curators and leaders tend to have quite different personality types in Myers-Briggs Type Indicator testing. She indicates that most curators tend to be introverted and are "dependable, considerate, committed to the people and groups they are associated with" (p. 192). As well, they "expect themselves and others to comply with organizational needs and structures, use personal influence behind the scenes, follow tradition, and use an eye for detail to reach practical results." Like others who align with this profile, curators tend to preserve traditions. Conversely, museum managers tend to be extroverted and "enjoy interacting with people…seek leadership directly and take charge quickly, applying and adapting past experience to solve problems." While Suchy's study does not reference transfer, a key point of her analysis is that diverse museum workers are likely to differ widely in their attitudes and approaches to the application of learning.

Just as a systematic and reliable profile of museum workers' characteristics is elusive, so is a consistent sense of professional identity and professional affiliation (J. Davis, 2001). Despite sector-wide usage of the term 'professional' to describe workers, knowledge, practice and education, the notion of what constitutes an individual museum 'professional' continues to evoke some uncertainty. Part of the problem is that this term encompasses "all professional, technical, and managerial employees of both traditional and non-traditional museums and heritage services as well as staff of a wide range of related bodies" (Boylan, 2006, p. 421). Within such an inclusive definition, it can be challenging for museum workers to develop a strong sense of fit within this generic term, particularly if a narrower disciplinary specialization takes precedence in the day-to-day work. For example, in my experience, most who stabilize and treat objects would claim the title 'conservator' before they would define themselves by the

more general title 'museum professional'. Bailey (2006) notes that those involved in public programming in her study of perceptions of role and identify, consider themselves as educators or teachers. The term museum professional does not come up in her analysis.

Weil (1996b) observes difficulties in claiming formal professional status in such a diverse and complex field, and suggests instead that the process of professionalization is an ongoing and beneficial 'pursuit.' Kavanagh (1994) notes that while there are many people in practice who do not hold formal museum qualifications, "there is a substantial number of people within the museum workforce who collectively and often consciously express the key characteristics of being a profession" (p. 8). Today, despite general acceptance of the ideology of professionalism across the sector, actual participation in professional associations and activities is less consistent. Of 24,000 people employed in 2500 museums in Canada, 2000 individuals, or less than 10%, are members of the Canadian Museums Association (CMA, 2009a). Even if those employed in clerical, support, maintenance and other tasks that may not claim professional status are excluded, this number is strikingly low. Membership in regional associations where people interact more closely with local colleagues is somewhat higher. In British Columbia, for example, of 383 museums, galleries and related institutions, 200 institutions hold memberships in the British Columbia Museums Association, and 155 professionals (Email communication from BCMA, April 5, 2011) working in these institutions and others that support practice (universities, government agencies) hold individual memberships.

Since not all learners in museum practice are actively engaged in professional associations, it seems likely that there is a varied level of understanding of and affiliation with the specific expectations of professionalism. A number of thoughtful accounts of the state of professionalism offer insight on both the benefits and challenges of increasing formalization in this area (Tran & King, 2007; Weil, 1988; Woollard, 2006). However, no empirical studies that explore how professional engagement impacts a commitment to learning and exemplary practice were found. For this reason, the degree to which case participants rely on external professional standards and support systems is included in the exploration of CRM graduates' experience and agency in applying their learning.

While Daley (2001) notes that "the process of making meaning from the knowledge presented at CPE programs [is] framed for each profession by the nature of its professional work" (p. 44), it is evident that the nature of museum professional practice cannot be easily summarized. The same is true of the agency for transfer exercised by the individual. Passion,

creativity, a love for museum work, and a commitment to social good shape the nature of museum professional practice and contribute to an interest in learning and exemplary performance. However, there is such diversity in the professional specializations, environments, foundational knowledges and identities that constitute diverse professional identities that the process of meaning making from CPE must be contingent on the subjective and situated realities of the learner.

The Likelihood of Transfer

Both the workplace conditions and agentic characteristics described above tend to be seen as enabling factors in the literature and in my synopses, although some writers take a more negative approach in discussing their absence as obstacles. Szuslanski (1996), for example, focuses primarily on the sticking points that inhibit the movement of knowledge within workplaces. He highlights the difficulties created by barren organizational context, lack of motivation, lack of reliable knowledge, lack of absorptive capacity, and arduous relationships, among others. While the notion that there are significant deterrents is worthy of attention in discussions of return on investment and performance improvement strategies, my review of the literatures suggests that, for the most part, the deterring or enabling qualities of factors are a function of their position along a continuum from absent to present or from weak to strong. Furthermore, it is the unique interplay of varied factors that seems to impact the likelihood of learning for transfer. With so many pathways to follow in learning to apply valued concepts, it appears that strength in some factor areas can compensate for weaknesses in others.

At the outset of this review, I noted that no single comprehensive explanatory model for tracing transfer dynamics in the museum world emerged from the crowded field of transfer studies and interpretations. While my synopses across the four categories of factors set out multiple considerations and describe efforts of varied researchers to, in some cases, establish causal linkages that determine the success of transfer, it is evident that every instance of successful transfer will be the outcome of a unique, dynamic and complex mix of personal and contextual interests and conditions. Case studies in various museum settings offer an intriguing and previously unexplored way of considering transfer dynamics in action and analysing how they come together to support and inform the evolution of practice.

Chapter 3 Methodology and Procedures

To ensure that research processes are transparent and traceable, this chapter provides a detailed description of the comparative case study methodology used in this study. It begins with a rationale for my interpretive paradigm and qualitative approach to the collection and interpretation of data. The choice of a comparative case approach based primarily on interviews is described, along with a rationale for the guiding theoretical framework and a discussion of how core constructs and propositions are addressed in operational terms. Sampling strategies and data collection methods are discussed, along with measures to ensure the reliability and validity of the data. My approach to thematic analysis is described, and a final section notes ways in which the study anticipates and mitigates biases and limitations.

Comparative Case Study Methodology

This study was grounded in an interpretive paradigm, in keeping with my interest in the subjective, situationally-mediated experiences and perspectives of learners and their colleagues as they seek to put learning to work in museum social settings. It builds on the epistemological position that the phenomena under study—and the research process itself—have been socially constructed and subjectively interpreted by all involved. A naturalistic approach to enquiry allowed me to look beyond ubiquitous positivist course evaluations to explore the lived experience of learners after they have left the classroom and returned to museum workplaces.

I selected a comparative case study methodology from a range of potential qualitative approaches to enquiry because it facilitated a rich and in-depth empirical investigation of the complex issues raised in the research questions (Stake, 2005, 2006; Yin, 2009). Cunningham (1997) observes that good case studies facilitate both explanation and discovery. Chima (2005) echoes this, noting that the strength of case studies is that they allow the researcher to "both learn *about* a specific social situation and also to learn *from* it" (p. 6, author's italics). Case studies share many characteristics with historical studies, in that they explore a range of evidence to build detailed description, but they add both observation and in-depth interviews to the data collection toolbox (Yin, 2009). They are also distinctive in that they take place within a clearly bounded context (Merriam, 2001); the investigator plays an influential role in extracting and therefore manipulating data; and they normally go beyond explanation of events to elaborate on guiding theory (Chima, 2005). A useful definition of this methodology that captures

its design logic, data collection techniques, and analytic strategies is offered by Yin (2009, p. 18). "A case study is an empirical enquiry that:

- investigates a contemporary phenomenon in depth and within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident.
- The case study enquiry:
    - copes with the technically distinctive situation in which there will be many more variables of interest than data points, and as one result
    - relies on multiple sources of evidence, with data needing to converge in a triangulated fashion, and as another result
    - benefits from the prior development of theoretical propositions to guide data collection and analysis."

Case methodology can be approached in a number of ways. Since this enquiry focussed on the diverse ways in which learning makes a transition to the workplace depending upon varied circumstances, I identified the multiple comparative case study approach as the most appropriate means of examining both consistencies and anomalies across varied museum settings. While not establishing causal relationships among factors (independent variables) and learning transfer (dependent variable), multiple case comparisons offer greater capacity than the single case method to affirm or extend the guiding framework by exploring how learning transfer varied across situations. The capacity to delve into the heart of a number of situations while also contributing to theoretical understanding across situations makes the multiple case approach effective in drawing meaning from the "messy" cores of cases (Kohli et al., 1995; Perry, 1998). Stake (2006) emphasizes the enhanced analytic benefits of the multiple case method, while both Merriam (2001) and Yin (2009) observe that the complex comparative evidence derived through this method is perceived as more compelling than from single cases, and that the method is regarded as more robust, stable and valid.

Despite their strengths, comparative case studies are seen as methodologically, logistically and personally challenging (Yin, 2009), with limitations relating to their validity and utility when viewed outside the interpretive orientation. Stake (2006) comments that the task of understanding the complexity and uniqueness as well as the "ordinary happenings" (p.29) of individual cases—while also seeking to identify commonalities and difference across the group—creates an ongoing tension for the investigator. The following description of my

methodological approach sets out measures that were put in place to address the role of theory, ethical considerations, my role as researcher, and concerns associated with validity and generalizability.

Case Selection

Unit of analysis

While this study focussed on the experiences and agentic characteristics of individual Cultural Resource Management graduates, the ways in which social settings shape learning transfer were also seen to be critical. For this reason, the unit of analysis for each case was the learner's immediate museum workplace. Using the workplace as the unit of analysis opens the door for complex, holistic and comparative explanations of how learning moves into and across museum settings as a result of learners' agency, workplace conditions, and other potential explanations for transfer. Depending upon the nature and size of the museum, the boundaries of the units of analysis in these cases varied from the entire museum to a functional work area within the museum.

Scope of study

The ideal number of cases was determined by the scope of data required to empirically ground results, perceived analytic benefits, the unit of analysis, and practical logistics (Merriam, 2001; Perry, 1998; Stake, 2006). In the absence of strict protocols for such studies, two cases were obviously seen as the minimum for comparative purposes, and more than six were considered unwieldy, given the volume of data that was expected to emerge. Since my cases focussed on multiple museum settings as their units of analysis, I recognized that they were more complex and demanding at the data collection and analytical stages than single cases which focussed on individuals. Given the inherent complexities of my proposed cases, as well as the limits imposed by time and resources, I decided that four case studies would provide sufficient meaningful data aligned with the scope and goals of the study.

Selection criteria and outcomes

Since both consistency and variation across comparative cases are valued (Perry, 1998; Yin, 2009) along with purposive selection to ensure rich, interesting and theoretically relevant stories (Stake 2006), the following criteria served as a basis for selecting specific cases from

approximately 200 potential museums in which CRM graduates work. To achieve some degree of commonality among CRM graduates as a means of facilitating comparison, selection criteria prescribed that these case informants should be:

- graduates of the Cultural Resource Management Program since 1999 so that recollection of transfer experiences would be relatively recent;
- recipients of high second-class or first-class grades, since this indicates that subjects performed successfully in coursework;
- professionally employed in a museum throughout the program, preferably within a single institution since this brings consistency to the experiences under study; and
- interested in reflecting on learning transfer, as indicated in a brief survey, "Applying Cultural Resource Management Knowledge in the Workplace" (May-June, 2009) conducted as part of PhD coursework; since this indicates willingness to participate in this project.

Even as a degree of consistency was seen as desirable in selecting individual informants, variance in museum settings was sought in order to explore transfer dynamics in varied circumstances (Flyvbjerg, 2006) and to highlight instances of difference in the context of collective similarity (Perry, 1998). To achieve variance, case selection considered the following:

- Size: a range of sizes, from a small museum that was likely to have a relatively flat hierarchy and broadly defined job descriptions, to a large institution with more structured and specialized work designs, was perceived as desirable.
- Specialization: a range of organizational roles and purposes was expected to provide diverse settings that offer insight on the situated nature of specialized professional priorities and practices[8]. As well, variation in graduates' professional roles was sought.

---

[8] The Canadian Museums Association (2009) defines museums as: "permanent, not-for-profit institutions whose exhibits are regularly open to the general public. This definition encompasses institutions that pursue similar objectives and accomplish most or some of a museum's functions. Accordingly, the following are also recognized as museums:

- Exhibition places such as art galleries and science and interpretation centers;
- Institutions with plant and animal collections and displays, such as botanical gardens, biodomes, zoos, aquariums and insectariums;
- Cultural establishments that facilitate the preservation, continuation and management of tangible and intangible living heritage resources, such as keeping houses and heritage centers;
- Natural, archaeological, ethnographic and historical monuments and sites.

- Location: a range of locations and settings including urban and rural locations was expected to offer further complexity and insight on the nature of workplace affordances.

Based on these criteria, I selected four cases from among 21 potential settings that were suggested by CRM graduates who volunteered to participate through the survey, "Applying Cultural Resource Management Knowledge in the Workplace" conducted in May-June, 2009:

Institution	Staff	Nature and Purpose	Unit of Analysis	Primary Informant	Museum Experience	CRM Graduation	Position
High Desert Museum, Oregon	48, with over 200 volunteers	Regional museum focused on interactions of natural and human history; funded by revenues, donations and grants	Collections and Exhibitions working group	Tracy Johnson	Began a seasonal museum position in 2002; and has worked at HDM since 2006.	2007	Curator of Collections and Exhibitions
Fortress of Louisbourg National Historic Site, Nova Scotia	60, with 250 seasonal staff	Historic site focused on presentation of an 18th C fortification; managed through Parks Canada	Cultural Resources working group	Ruby Fougére	Began working with FoL as a collections technician in 1989.	2009	Collections and Public Education Specialist
Musee Heritage Museum, Alberta	6, with dozens of volunteers	Community museum, managed by a Foundation and funded by the City of St. Albert	Museum staff	Ann Ramsden	Has worked in range of museum positions since the mid-1990s; began with MHM in 2001 and assumed director role in 2005.	2007	Director
Gwaii Haanas National Park Reserve and Haida Heritage Site, British Columbia	44, with a small number of seasonal staff	Eco-museum focused on the protection and interpretation of Haida heritage in a remote archipelago; jointly managed by Parks Canada and the Council of the Haida Nation	Ecosystems working group	Barbara Wilson	Began working with GH in 1989, and has held positions in both public programming and cultural resource management.	1999	Cultural Liaison Specialist

Table 4. Case settings

In each case, the primary informants were experienced professionals, although their length of experience and seniority within organizations varied. While they share a similar commitment to continuing professional education, each has a different professional specialization and works in a different type of museum workplace. Two informants have

completed all their coursework in a distance education format, while the other two have taken most of their coursework in on-campus intensive formats.

After selecting names from the survey, I made initial contact with each CRM graduate to confirm their interest in participating, to provide further detail, and to explore mutually agreeable timelines for interviews. In each case, graduates were also asked to recommend the involvement of supervisor(s) and colleagues who could provide perspectives on the workplace climate for learning transfer and on the supports and/or constraints encountered in applying new knowledge and practices.

Informed consent

Once Human Research Ethics Board approval was obtained in November 2009, along with Parks Canada research permits (October 2009 for Fortress of Louisbourg, January 2010 for Gwaii Haanas), each CRM graduate was asked to complete a participant consent form (included in the Research Protocol, Appendix B) and to confirm that they had the permission of a supervisor to participate. The consent form emphasized that participation was voluntary, that the participant could withdraw at any time up to the integration of their responses in case analyses, and that anonymity was waived but that confidentiality was protected. Colleagues and other recommended informants were contacted by email with an invitation to participate that set out conditions and expectations and requested that they complete a Participant Consent form. In two cases, additional colleagues were identified for interviews during the site visit, and Consent forms were obtained at the time of the interview.

Anonymity and confidentiality

Given both the benefits of developing authentic cases that present real and contextualized evidence (Yin, 2009) of learning transfer dynamics, and the challenges of ensuring anonymity among informants within each case setting and across the broader museum community, it was recognized that anonymity would not be possible or desirable in case reporting. Accordingly, these cases describe each setting in an open and undisguised manner.

However, it was also recognized that using multiple surnames could distract and create confusion for readers. Consequently, only CRM graduates' surnames are used in case descriptions. Their colleagues' work titles are cited rather than their surnames. Not only does this strategy provide colleagues with a limited level of anonymity, it also depersonalizes the

accounts and encourages the reader to consider transfer dynamics as a series of social interactions among a group of professionals in the museum context.

In conducting the interviews, I requested that informants avoid observations regarding colleagues who are not directly involved in learning transfer processes under discussion, and that they refrain from making comments that could in any way be construed as libellous. In preparing case studies I strived to avoid presenting informants' colleagues or their actions in a negative light, and to protect any information that was explicitly shared with me in confidence. In many instances, direct quotes are integrated in case descriptions and analyses, and are attributed to the source.[9]

Audio recordings of interviews, transcripts, documents and any personal information that was provided in the course of case study development have been treated as private and confidential. These materials have been stored in secure filing cabinets or password protected electronic files, and passwords and coding keys have been securely stored in separate locations. As principal investigator, I control access to this data. Interview transcripts and documentation may be examined by members of my supervisory committee, and may also be shared exclusively with the subject of the interview, by request, until the dissertation is complete and approved.

Ethical considerations

To ensure that this project was conducted in an ethical manner, it adhered to protocols established in the *Tri-council policy statement: Ethical conduct for research involving humans, 1998,* as monitored through the University of Victoria's Human Research Ethics Board approval process. A key concern was the degree to which informants' anonymity and confidentiality were protected. As described above, only limited anonymity for individual informants was offered due to both the desirability of presenting authentic cases and the difficulties of disguising identity among individual informants within a single case and across the museum community. Nevertheless, as I recognized my ethical responsibility to protect informants' from risk and honour their privacy, confidentiality and reputations, I made every effort to ensure that data was handled and interpreted in a manner that respects these obligations.

As the informants in this study are colleagues within the museum sector and may have ongoing involvement with the Cultural Resource Management Program, I have avoided any conflict of interest or power-over relationships by acknowledging my obligation to refuse

[9] Page numbers in Chapters 5 and 6 link to original transcripts.

requests for references and to excurse myself from any decision-making process that relate to program admissions, funding or appeals.

Beyond legal and ethical requirements to treat subjects in appropriate and respectful ways, I acknowledged my personal obligation to manage research processes and outcomes in ways that minimized bias and strengthened the validity and reliability of the study. In addition to shaping the questions, methods and data collection protocols through my philosophical orientation and interests, I served as the primary instrument for data collection and analysis, and was one of the few constants in the study since cases were drawn from varied settings. In the role of data collector and analyst, the knowledge, communication skills, experience, vision, sensitivity, energy, and biases that I brought to the process are recognized as critical in shaping the study and determining its outcomes (Fontana & Frey, 2005). I understand that my subjective reality and my narrative authority (Biklen & Casella, 2007) became as much a part of the case study as participants' subjectivities, and that this influenced both what data was illuminated through the focus of the enquiry and how resulting knowledge has been co-created. I also recognize that my biases influenced what aspects of learning transfer phenomenon were left aside as insignificant or irrelevant. Given this central, highly influential role in co-creating the outcomes of this enquiry, I have tried to be constantly conscious of and candid about the biases that my beliefs and behaviours may have imposed on all aspects of the study.

Validity

The strength of the multiple case study approach in probing the 'messy' centres of situations is also seen to be a weakness. As cases do not have the sizable samples or systematic controls that ensure measurement validity, case study researchers focus on achieving systematic validity by ensuring that data collection methods and analyses are appropriately aligned with guiding theoretical and methodological frameworks in order to "inform the questions that motivated the research in the first place" (p. 205). As Chima (2005) notes with regard to inevitable difficulties in controlling variables, "…the 'internal validity' of case-study findings is actually predicated on the plausibility of the analysis, the logical nature of the nexus between the dependent and independent variables, and the explanatory utility of the findings" (p. 14). Six strategies, including triangulation, member checks, long-term observation, peer examination, collaborative research, and articulation of researcher bias, are recommended to enhance the internal validity of qualitative methods (Merriam, 2001).

The intent of case studies is not to find statistically significant correlations that are generalizable to populations. Instead, they create rich and intimate descriptions of social interactions that *may* be generalizable to theoretical propositions (Yin, 2009) or that offer user generalizabilty by virtue of the insight they provide to readers (Merriam, 2001). In helping to substantiate or expand theoretical understanding of the phenomenon under study, case studies are seen as a 'local' (Hoadley, 2004; Stake, 2006) and 'tentative' in their inclination to generalize findings. To ensure validity this study is undertaken within the context of guiding theory, and uses systematic data collection and analytic methods. These are described below.

The role of guiding theory

The relationship with theory in the case study method is complex and 'peculiar' (Chima, 2005). Guiding theory is seen as helpful in making sense of complex social situations and in providing structure for analysis and interpretation. However, since theory can also obscure the value of non-conforming data that is likely to emerge in the data collection phase, researchers are encouraged to be open to information and unexpected issues that might not be accommodated in—or be contrary to—the guiding theoretical framework (Chima, 2005; Hodkinson & Hodkinson, 2001; Stake, 2006). Speaking from a comparative politics perspective, Kohli et al. (1995) comment that a benefit of case study methodology is that it:

> ...draws on general theories whenever it can but also cares deeply about the particular historical outcomes. It sees particular cases as the building blocks for general theories and theories as lenses to identify what is interesting and significant about particular cases. Neither theories nor cases are sacrosanct. Cases are always too complicated to vindicate a single theory so scholars who work in this tradition are likely to draw on a melange of theoretical traditions in the hope of gaining greater purchase on the cases they care about. At the same time, a compelling interpretation of a particular case is only interesting if it points to ways of understanding other cases as well (p. 4).

The interplay between the guiding theoretical framework and potentially unpredictable findings of one or more case studies is useful in identifying both strengths and deficiencies in the guiding theory's descriptive accuracy, utility, and predictive value, and it allows the researcher to suggest ways in which theory might be reformulated as an important outcome of the study (Chima, 2005).

In this project, guiding theory related to diverse transfer factors associated with individual agency and workplace conditions offered a valuable framework for research design, initial data coding, thematic analysis, and interpretation. However, in keeping with the capacity

of comparative case studies for both explanation and discovery (Cunningham, 1997), a degree of flexibility was maintained throughout the data collection, coding and analytic processes to respond to unexpected themes in learning transfer accounts. By remaining open to alternate explanations for transfer experiences, this study moved beyond a description of events to elaborate on and contribute to its guiding theories (Chima, 2005; Hodkinson & Hodkinson, 2001). My approach is in keeping with George and Bennett's (2005) observation that:

> Case study researchers generally sacrifice the parsimony and broad applicability of their theories to develop cumulatively contingent generalizations that apply to well-defined types or subtypes of cases with a high degree of explanatory richness. Case study researchers are more interested in finding the conditions under which specified outcomes occur, and the mechanisms through which they occur, rather than uncovering the frequency with which those conditions and their outcomes arise. (p. 31)

Construct validity

A critical step in ensuring that the outcomes of this enquiry can be generalized to its theoretical framework was the explication of core propositions and constructs in relation to both the research questions and the data collection strategies. In designing a protocol to guide research, Yin (2009) emphasizes the importance of clarifying the nature of information that must be extracted from the various data sources to properly address relevant propositions to ensure construct validity. As noted in Chapter 1, and elaborated in Chapter 2, it was important to specify the general characteristics of the study's cases and their participants as a means of clarifying the conditions that shape phenomena of learning transfer in these museum settings. Such distinctive characteristics as organizational and personal commitment to cultural heritage stewardship, the professional nature of museum practice, and the associated autonomous nature of work in museum settings were identified as potentially influential in transfer in museum settings. Specific propositions and constructs that relate to adult learning for professional practice shape the focus and structure of data collection. These are described in detail in the Research Protocol, Appendix B.

Data collection and management

Data collection and management principles and procedures were grounded in University of Victoria protocols for Human Subject Research (Appendix A), the guiding theoretical framework described above, and the detailed Research Protocol designed to reinforce reliability (Appendix B). Systematic application of these principles and protocols, consistent use of defined

terms, and detailed field notes on the data collection created an evidentiary chain for each case setting, and reinforced the accuracy, consistency and trackabilty of the data gathered. Consistent coding to inform the thematic analysis process helped ensure that evidence and constructs were appropriately linked.

Data collection

In keeping with Yin's (2009) contention that the validity and reliability of cases can be strengthened through the use of multiple sources, this study systematically collected the following types of descriptive data:

Documentary evidence:

In preparation for each case visit, I acquired and reviewed a range of organizational documentation to gain insight into both organizational structure and respondents' roles and backgrounds. Such documentation included:

- past and current museum mission and goals,
- strategic plans,
- organizational structure, indicating the CRM graduate's current and past positions,
- professional development and organizational learning policies and procedures,
- position descriptions,
- resume,
- performance and professional development plan(s), and
- other materials that describe the graduate's museum roles and responsibilities,

This material was logged, and where such materials as professional development policies and performance planning templates were not provided, I followed up to determine if such documents exist within the museum context.

Interviews

As I was interested in the ways in which learners themselves perceive and make their learning meaningful in the workplace, the primary source of data in this project was in-depth open-ended interviews with CRM graduates to probe both their transfer experiences and their perspectives on factors that influenced transfer activities. However, as the unit of analysis in each case was the working group, focussed interviews with 4 or 5 colleagues and supervisors in each setting were also used to gather data on conditions that facilitate or constrain learning

transfer. These focussed interviews introduced multiple perspectives that served to triangulate data provided by the primary informants.

As noted in the discussion of construct validity, interviews were designed to gather data aligned with the guiding theoretical framework. At the same time, I recognized that case studies are an emergent research method that can respond to unanticipated themes that arise in the data collection process. Accordingly both prompts for the interview with CRM graduates and questions for the structured interviews with colleagues and supervisors served as guidelines for interviews, but not rigid structures that limit further discussion.

As each site visit took place over two to three days, interviews with CRM graduates were undertaken in several 1-2 hour sessions over that time, while more structured interviews with colleagues normally took place in single sessions of 40 minutes to one hour. In addition to fitting within learners' work commitments, dividing interviews with CRM graduates into multiple sessions was useful in building my relationship with learners and allowing them time to reflect and offer new insights to subsequent sessions. At the start of all interviews, I reviewed both the structure and goals of my process and the participants' rights.

To reinforce the reliability of data collection within and across the individual case studies and to facilitate systematic comparison, methodological protocols, an organizational plan, interview instruments, field procedures, and data collection rules were set out in the Research Protocol (Appendix B). This guiding document was developed and then slightly refined upon completion of the first case study. Detailed prompts for unstructured interviews with CRM graduates and questions for interviews with colleagues are included in this document under 7.4 Interview Protocols.

Over the course of the site visits, ideas and topics suggested by earlier interviews were integrated in subsequent interviews to explore fresh insights about learning and transfer. For example, a comment in initial interviews at Musée Heritage Museum, that learning associated with exhibition and curatorial themes tended to receive higher organizational priority than learning for professional practice in a busy and resource-strapped environment, prompted me to enquire about this in other settings, and revealed that this is a pattern in all four cases.

Survey on Autonomy and Initiative

To animate a discussion of the degree of autonomy and initiative that CRM graduates exercise in their work and their transfer experiences, each was asked to complete two brief

surveys during the interview process. Survey 1: Degree of Autonomy in Approaches to Work, Learning and Transfer, and Survey 2: Degree of Personal Initiative in Approaches to Work, Learning and Transfer are included as Appendix C.

Field Notes

In addition to documentation and interviews, I prepared field notes at each site that included observations, reminders to follow-up on outstanding issues, and reflections on organizational and transfer dynamics. These hand-written notes are included with case study binders prepared for each site, alongside site documentation and permissions documentation.

Data management

All interviews were digitally recorded, and immediately after each site visit, I prepared verbatim transcripts, including notations on non-verbal communications, in Microsoft Word, and double-checked them against the digital recordings, with the following outcomes:

Site		**Participants**	**Duration of Interviews**	**Transcribed pages**
High Desert Museum		Johnson + four colleagues	7 hours, 9 minutes	97
Musée Heritage Museum		Ramsden + five colleagues	7 hours, 46 minutes	91
Fortress of Louisbourg		Fougère + four colleagues	7 hours, 59 minutes	104
Gwaii Haanas		Wilson + five colleagues	7 hours	95
Totals	4 cases	22 participants	29 hours, 54 minutes	387 pages

Table 5. Interview data

Both interview transcripts and documentary sources were then entered in the qualitative data management software program *NVivo* to permit thematic coding, sorting, queries, analysis and display. Password protection limited access to these materials throughout the project.

Data analysis and interpretation

Systematically extracting meaning from transcripts and documentation was undertaken within the context of themes embedded in the guiding theoretical framework of transfer factors (Figure 2 in Chapter 1), with particular emphasis on those associated with agency and workplace climate. Thematic analysis that identifies links among possible causes and observed outcomes is used to identify influential dynamics evident in varied transfer processes. This analytic method enables me to consider the fit of examples of situated transfer within the existing typology of learning transfer factors and associated theories. This qualitative approach does not seek to definitively measure the strength of factors so much as to explore their interactions, convergences and roles in varied transfer experiences.

Thematic analysis provides a "flexible and useful research tool which can potentially provide a rich and detailed, yet complex, account of data" (Braun & Clarke, 2006, p. 78). Since thematic analysis is independent of a particular methodological approach to enquiry (unlike discourse analysis or phenomenological analysis, for example) it can be used to either generate theory or to test the relevance of pre-existing theory. The latter approach was compatible with this study's interest in the relevance of transfer themes or factors to the museum sector. Braun and Clarke characterize this as 'theoretical' thematic analysis and note that this normally involves a selective approach in exploring data. In this study I focussed on the analysis of data that specifically related to patterns of meaning within the context of learning transfer themes predicted in the literature. At the same time, this approach remained open to the emergence of unanticipated or more nuanced themes through the iterative process of tracing divergence and congruence with theory. For the purposes of this study, I considered a theme to be learning transfer dynamic or factor that influenced transfer in a distinctive manner. For example, within the category of motivations for agentic transfer behaviours, disposition, individual autonomy and self-efficacy are identified as themes.

Braun and Clarke (2006) suggest that thematic analysis takes place in six steps: (1) becoming familiar with the data; (2) systematically coding data; (3) identifying themes; (4) reviewing and mapping themes; (5) defining and naming the theme; (6) producing the report. The following description of my analytic process notes ways in which this study engaged in these steps, but adds a first step that acknowledges the initial development of a guiding thematic framework that shapes the study:

Developing the guiding theoretical framework:

As noted in Chapters 1 and 2, the factors associated with transfer processes can be clustered in a number of themes relating to agency and workplace climates, as well as to the nature of knowledge and learning for professional practice. These, along with propositions on the ways in which people and social settings are interdependent, provided a thematic structure for interviews that shaped and bounded data collection (See Research Protocol, Appendix B).

Becoming familiar with the data

The processes of gathering data through extended and engaging interviews, reflecting on data collection in field notes, creating verbatim transcriptions, and double checking them against the digital recordings, gave me a deep level of familiarity with the overall data and highlighted congruence with themes in the guiding framework. At the same time, it surfaced unforeseen dynamics in learning and working that suggested additional themes, some of which related to the overall context of professional practice as opposed to specific transfer experiences. During transcription, I added my own commentaries as sidebars when I recognized ways in which data reinforced theory, diverged from theory, suggested patterns, or introduced unanticipated detail. These comments were useful in subsequent coding and analytic steps.

Systematically coding data

Once transcripts from interviews in each case setting were completed, I systematically coded data extracts (a single comment, or series of comments which contextualize the data) that I perceived to be relevant to the topic at either a semantic or latent level. Working with the coding functions of *NVivo*, I prepared an initial themed set of codes derived from transfer factors set out in Figure 2, Chapter 1, with particular emphasis on detailed themes associated with agency and workplace climate. In many cases I recognized that data extracts were relevant to multiple topics and coded them accordingly. As my initial codes were designed to explore data specifically associated with transfer factors, I added additional codes when interesting data associated with broader themes that seemed relevant arose. Detailed coding is presented in Appendix D. Some data was not coded if I was unable to perceive a link with my research questions. While I was wary of decontextualizing themed data to the point that meaning was lost, I found that my familiarity with the cases as comprehensive stories allowed me to move easily between the raw and refined data.

Identifying themes:

As my initial codes were already organized by themes derived from the literature, this stage involved stepping back from the coding process to review the degree to which initial and added themes created coherent clusters associated with transfer in the four museum settings. Some codes were heavily subscribed, while others contained few data extracts. These offered an early indication that some themes/factors were of greater relevance to the museum case settings than others.

The process of preparing thick descriptions of each of the case studies made a significant contribution to the identification and refinement of themes, while also reducing and further developing my familiarity with the data. Coded data from multiple interviews and documents enabled me to organize and thoroughly integrate diverse perspectives and accounts of transfer in each setting as I prepared these detailed narratives. Each began with a description of the museum setting, derived from documentation, observation, and interviews. Detailed discussions of organizational nature, culture, perspectives and supports for learning, and climate for transfer were followed by a focus on the CRM graduate's agency for transfer in terms of ability, capacity and motivation, organized in keeping with the thematic elements of the guiding framework. A final section that discussed transfer experiences was prepared along with overall reflections on the case and insights it offered around the transfer of learning. Each description is approximately 45 pages in length and integrates extensive quotation from transcripts.[10]

As interviews yield data that "are subject to the common problems of bias, poor recall, and poor or inaccurate articulation" (Yin, 2009, p. 108) the information presented in documents and across various interviews was triangulated in order to identify convergence and variance in accounts of transfer conditions and experiences. While some minor difference in recall emerged, and some factual differences in understanding of organizational policies and procedures were noted, for the most part interviews and documentation in each case setting provided consistent accounts of organizational contexts and individual experiences. To ensure that thick descriptions accurately portrayed the comments and perspectives of the participants and as well as my interpretations of organizational culture, climate and agency, respondents were asked to corroborate the description and/or to suggest clarifications and changes to the

[10] A sample thick description is included as Appendix E to provide readers with the opportunity to review this step of the analytic process.

evidence that is presented in the write-up. This member-checking process took place over a number of months after the completion of thick descriptions and of the 22 respondents requested for feedback, 17 replied with either a confirmation that the description reflected their contributions accurately or with requests for minor changes to clarify their intent in making a comment, to add a thought, or in one case, to correct an attribution for a statement. No challenges to the interpretation of data were offered. This approach to checking the validity of initial drafts of cases is seen to strengthen the accuracy of the evidence presented in case studies (Yin, 2009).

Reviewing and mapping themes

This step focussed on making visible the relative strength of predicted themes that were detected in the coded data and the thick descriptions, along with identification of unanticipated or under-anticipated factors, in order to trace both patterns and points at which data reinforces or diverges from the guiding framework. For example, while passion for museum work is consistently noted across all cases, passion as a factor in agency for transfer is not widely explored in the literature and is subsumed under affiliations. The process of reviewing and mapping themes illustrates the recursive nature of qualitative enquiry. As unanticipated themes were identified, it became necessary to return to the literature to seek further insights. At the same time, as data reinforced established themes, my understanding of their significance and impact was further developed. Stake (2006) calls for a dialectic approach in analysis and interpretation, saying, "I think it best that the issues of the individual cases *not* merge too quickly into the main research questions…they need to be heard a while, then put aside a while, then brought out again, and back and forth…" (p. 46). In keeping with the capacity of case studies to highlight amendments or elaborations of theory, mapping themes at this stage emphasizes those that are distinctive in these cases. A map of predicted and emergent themes associated with agency and workplace climate is included in Chapter 5 *Case Comparisons*.

Defining and naming themes

An important next step in defining learning transfer themes that are of particular relevance in the museum sector was the preparation of brief individual case descriptions focussed on specific transfer conditions and experiences in each setting. By returning to the contexts in which transfer themes assume meaning, the 'essence' (Braun & Clarke, 2006) of a theme, as well as its particular nuances and causal interdependencies in the case setting, are

highlighted. Within the four cases presented in Chapter 4, the narrative is primarily descriptive to capture the special nature of the place and the people. Nevertheless, given the breadth of data derived from each case, as presented in the much more detailed thick descriptions, these brief within-case descriptions selectively provide evidence of learning transfer agency and workplace climate themes and of transfer experiences that are prominent in each setting. I made extensive use of quotes from interview participants as their words offer rich, authentic and nuanced views of transfer experiences. Ellipses points are used to indicate the omission of extraneous words, but do not intentionally alter the meaning inherent in these quotes.

Producing the report

In Chapter 5 Case Comparisons, and Chapter 6 Discussion and Implications, analytic themes are more explicitly explored in a critical and comparative narrative to suggest distinctive learning transfer dynamics encountered within and across cases. Chapter 5 is organized according to the guiding framework of transfer factors noted in a revised thematic map (Figure 3, Chapter 5) to highlight both alignment with and divergence from theory, and to discuss implications for learning for professional practice in the museum sector. Chapter 6 synthesizes outcomes and considers implications.

Methodological Challenges That Impact Study Design

The need to compress the wealth of theory, concepts and practice that comprise discourses of workplace learning and museum professional education is a primary limitation of this study. In highlighting only the core ideas in each of these areas, detailed explanations, nuanced meanings and potential relationships across the two discourses are left aside in favour of a conceptual overview of how transfer factors inform this project. A related limitation is that rich resources from the discourses of knowledge, adult education, and case study methodology are only briefly referenced.

Another limitation is that themes in the data are solely identified by the investigator, with guidance from a supervisory committee. While this introduces some consistency in coding and interpretation, it also limits the recognition and integration of diverse perspectives as meaning is derived from the data. Further studies in this area could benefit from greater involvement of other researchers or from participants, to reinforce the relevance of coding.

Linked with this concern is a bias toward verification "understood as a tendency to confirm the researcher's preconceived notions" (Flyvbjerg, 2006, p. 234). Case studies, like other qualitative methodologies, are inevitably shaped by the researcher's subjective view. Flyvbjerg notes that awareness of this sensitizes researchers to an important issue that both enriches and limits case enquiries. On one hand my subjectivity brings significant experience and prior knowledge to the enquiry. On the other, it introduces occasionally arbitrary and specialized judgement. While it is not possible to eliminate bias, it is important to acknowledge my influence and to be attentive to how it impacts all stages of the research process. In this study, my assumptions are that every learner engages with the learning process in different ways that shape understanding and subsequent use. Other biases that may colour my perspective include my conviction that continued learning is critical to professional practice; my knowledge of and interest in the Cultural Resource Management program, and a desire to verify that it has resulted in positive difference in learners' working lives; my prior relations with respondents and an implicit desire to hear and interpret their experiences in a positive light—although in two cases I had only had prior contact with participants by phone. My pre-conceived notions include a long-standing recognition that educational programs could do more to create meaningful relations with employers. However, it was not until I embarked on this study that I had any exposure to or knowledge of transfer dynamics beyond a general assumption that learning is somehow applied, so I do not bring strongly pre-conceived notion about transfer dynamics.

A related concern is the degree to which the sampling method biases this study toward favourable transfer outcomes. My sample is drawn from a population that is inherently interested in learning for improved professional practice by virtue of their involvement in the CRM program, and the particular case settings that I selected were chosen in part, because the participants were both successful as learners and interested in discussing their experiences with transfer. As many other museum workers are not equally engaged in learning activities, the outcomes of these cases cannot be seen to typify museum workers across the sector.

As well, while the interview method offers rich, authentic and nuanced accounts of learners' experiences, it also has limitations that must be taken into consideration in analysis and interpretation. Transfer of the multi-faceted learning that results from the 12-course CRM program to workplace settings is not a simple process that is subject to uniform transfer processes or interpretations. Given the multiple kinds of learned knowledges that may be applied to complex and diverse tasks of varied priority within each complex case setting, case

analyses reveal multiple versions of transfer experiences that are shaped by varied combinations of factors. While, in many cases, the effective transfer of new knowledge and skills is the end outcome, pathways to this outcome are varied. At the same time, given the diverse and often generalized accounts of transfer experiences that take place over four to five years of CRM participation within each case as well as in the elapsed time since graduation, this analysis cannot trace specific transfer experiences in systematic detail. Instead these cases follow respondents' descriptions of notable transfer experiences at a more general level with the intervening time and circumstances softening the details, but adding perspective.

In seeking to create thematic categories that help organize this enquiry I also recognize that there is a danger of taking a reductionist approach that simplifies complex phenomena (Hodkinson & Hodkinson, 2004). To counter this, it has been important to focus throughout research design, and data collection, analysis and interpretation, on the interdependent nature of factors within and across thematic categories.

Summary

This chapter argues that the comparative case method provides an appropriate means of exploring the lived experiences of CRM graduates as they make use of learning in museum settings. It describes a purposive approach to case selection and notes the measures taken to protect confidentiality and manage anonymity. Descriptions of the data collection, analysis and interpretation processes are included, with particular attention to measures to ensure reliability and validity. A final section reflects on the challenges inherent in case study research.

The process of conceptualizing my research, collecting the data, and then living and working with it for over a year of analysis and interpretation has been an increasingly rich learning experience. While my initial questions have provided a sustained focus and enduring interest throughout the process, the ways in which the literature and the data informed one another progressively evolved in notable and recursive ways. The more I read before, during and after data collection, the more understanding I brought to the analytic processes. The more I engaged with the data, the more meaningful the literature became. And beyond my methodological focus on this project, I have become much more attuned to transfer dynamics—and to my own biases and subjectivities—in everyday life. While this process is, at times, characterized by uncertainty and ambiguity, it has many rewards.

Chapter 4 Transfer Experiences

Four case settings, four CRM graduates, and eighteen colleagues offer perspectives of learning transfer in the museum world that have much in common. At the same time, accounts of transfer in each setting differ in notable ways according to the subjective and social realities of the people and places. This chapter addresses the first research question "what are the experiences of museum professionals as they seek to apply the concepts, principles and skills that they have gained through continuing professional education?" In doing so, it highlights distinctive themes that arose from data coding and from thick descriptions prepared for each of the cases[11]. The descriptions of individual cases set the stage for a subsequent chapter that takes a comparative approach in exploring how factors associated with agency and workplace affordances appear to influence transfer across museum settings in order to answer the questions: "how do conditions in the workplace shape the transfer process?" and **"**how does personal agency influence learners' inclination to put new learning to work?"

While the order in which cases were investigated was arbitrarily determined by participants' availability and travel logistics, cases are presented here in an order determined by the years of work experience of the CRM graduate. The logic behind this is that approaches to the use of new learning shift subtly as the learner gathers experience, knowledge and influence through the processes of work and personal development (Eraut, 2004). Maturity in experience, of course, is mediated by many other factors, but serves as organizational aid.

High Desert Museum

In the context of the attractive grounds, buildings and exhibitions that welcome you at the High Desert Museum, it is not surprising to hear Tracy Johnson's accounts of successful and rewarding learning transfer experiences. From planning a collections vault, to developing conservation strategies for a stagecoach, to the challenging steps she took in curating an exhibition, Johnson clearly describes how learning for professional practice through the CRM program contributes to the quality of her work in this striking museum environment. What is surprising however, is the degree to which the transfer processes she describes result from her personal initiative, rather than from a systematic organizational development strategy.

[11] The thick description prepared for Fortress of Louisbourg is included as Appendix E to provide a sample of the way in which data was reduced and organized in this step.

Interviews with Johnson and her colleagues reveal the ways in which dedicated staff shape this innovative museum environment in the face of resource challenges.

High Desert Museum (HDM) in central Oregon is the only American museum that I visited. It casts a wide net in that it explores ways in which peoples' lives impact—and are impacted by—the natural environment in an arid, mountainous region that spans four states and one province. HDM is unusual in the museum world as it is not associated with a parent funding agency, relying instead on revenues from admissions, sales, rentals and contracts, and on funds raised through sponsorships, donations and grants to support its $3.9M operating budget. This independence encourages quality and innovation to ensure that HDM is appealing to tourists and local residents. At the same time, emphasis on attendance pressures its 47 staff members to sustain ambitious exhibition and public education programs. There is a pervasive sense that while public spaces are calm and inviting, staff behind-the-scenes are flat-out busy.

HDM is a mid-size museum that can be considered to be a moderately complex system in keeping with Broad's (2005) typology of organizational complexity, in that it is a single entity with a traditional hierarchical structure. The chain of command is visible and accessible with power transmitted from the executive level through successive functional levels. The museum is led by a President, and staff are organized in four units: Programs (including Wildlife, Collections and Exhibitions, Education, and Living History), Communications, Development, and Administration. Given the size of the HDM and the diversity of its working groups, this case study focuses on the Collections and Exhibitions (C&E) unit in which Johnson plays a leadership role as Curator of Collections and Exhibitions. Within this group, I interviewed Johnson and four colleagues including her supervisor who serves as Vice President of Programs (VP), the History Curator (Curator), the Exhibit Team Lead (Designer), and the Exhibits Preparator (Preparator).

As a young professional with eight years experience in increasingly responsible positions in three museums, Johnson acknowledges that the growing scope of her roles in collections, exhibitions and curatorship at HDM is due, in large part, to efforts to put knowledge gained through concurrent involvement in online CRM courses to work. In her multi-faceted position she balances the somewhat solitary and procedural responsibilities of collections management with more recently assigned responsibilities for team-based, conceptual and creative processes in exhibition management. Not surprisingly, her descriptions of transfer experiences reflect the diversity of expertise and relationships that characterize her daily work. As well they illustrate that, while organizational and agency factors tend to consistently influence the likelihood of

transfer in either positive or restrictive ways, others vary according to the transfer circumstance. This case begins with an exploration of the factors that shape the climate for transfer. The ways in which Johnson herself acts as an agent of transfer are also explored, followed by a final section that focuses on Johnson's transfer experiences in this situated context.

Organizational climate for transfer

A powerful theme expressed in HDM interviews and documents is the innovative nature of the work of the Collections and Exhibitions unit. The purpose and vision statements of the museum state that it aspires to foster "stewardship of the natural and cultural resources of the High Desert" by serving as the "preeminent resource for exploring the historic and contemporary relationships between the people and the High Desert landscape." The mission further defines this vision by stating "through exhibits, wildlife, and living history, the High Desert Museum creates learning experiences to help audiences discover their connection to the past, their role in the present, and their responsibility to the future" (HDM, 2009, p. 5). C&E staff see this mission as an important framework for their work. They frequently reference the need to meet the mission and one comments that "It's a wonderful, wonderful place to be in the world, because every exhibit has a deep scholarship" (VP, Telephone Interview, December 8, 2009). Diverse and engaging exhibitions that present an integrative view of human and natural history attest to the span of this mission and the creative energy that backs it.

While C&E staff indicate that they are inspired and guided by the mission, they are challenged in addressing its scope. Johnson comments that the museum encompasses "...such varied collections and different cultures…. A lot of them also overlap, so how do you choose the specific communities you represent? …I do think some of those are almost too mission-big and they can be confusing" (Johnson, Personal Interview, December 2, 2009, p. 32[12]). She notes that the museum interprets eight [states] and a province and observes "I can definitely see about four states. And getting into Canada, that's a whole other thing, because…most of the people here don't know anything about BC, other than [the Curator]" (p. 32-33). This challenge is also noted by the VP. "The mission is so unique here, and it's hard to find exhibits that are mission [appropriate] from the outside, and we don't have the curatorial [capacity] here to create them"

[12] Page numbers for quotes refer to transcripts; these will be removed in final draft as the reader will not have access to the transcripts.

(p. 6). Despite these concerns about fulfilling the mission, a level of excitement about the range of creative possibilities that it presents is evident.

The mission statement establishes the broad scope of museum work undertaken at HDM. However, C&E staff note that busy schedules have made it difficult to undertake operational planning. Strategic and interpretive plans have been prepared (HDM, 2004; Studio Hansen Roberts et al., 2005), but an increased exhibition schedule due to recent short-term budget pressures has limited time and resources for implementation (e.g. Johnson, p. 37, VP, p. 4). "It's not easy being private and you don't get automatic funds" (Preparator, Personal Interview, December 2, 2009, p. 5). Staff reflect that it would be useful to "set forth a process of not just providing a goal but planning the groundwork to get to that goal" (Preparator, p. 5). This is echoed by the Designer, who reflects that "more planning takes more time, takes more focus, and we just haven't had the luxury to do that. For me, it's imperative that we look at each thing we're trying to accomplish and be realistic about what it takes to accomplish it" (Personal Interview, December 2, 2009, p. 6).

Accordingly a factor that appears to influence the transfer climate for C&E staff is a strong focus on short term goals for exhibition development. Staff draw on a wide range of existing skills as they strive to address the full range of themes within the museum's mandate. As Johnson notes "...representatives from each department...come together, brainstorm...[and] check if we are meeting our mission. What did we leave out this year that should be put in next year?" (p. 23). She comments that within this process staff are able "...to introduce our own ideas." However, when internal expertise to pursue a topic is lacking, the Museum is challenged to address interpretive themes, even if they are perceived as mission-specific and timely. As one staff member notes, "our limitation is intellectual brainpower" (VP, p. 6). In this setting those with a compelling idea are most likely to be influential in shaping the exhibition agenda by virtue of their interests. The Curator, for example, has been the driving force behind the exhibitions entitled *Sin in the Sagebrush* and *Buckaroo! The Hispanic Heritage of the High Desert*; and Johnson initiated an exhibition entitled *Art through Ancestry*.

Staff development does not attract explicit attention in this busy and productive environment. Annual performance reviews focus primarily on evaluation of accomplishments, and both organizational and performance planning tend to articulate generalized goals as opposed to strategic and measurable outcomes. Perhaps because dedicated staff have defined their own work in self-directed, collegial and productive ways over time, HDM has not seen a

pressing need for policies, procedures and resources that identify knowledge gaps or that strategically link staff development with organizational development. A professional development policy has not been articulated, and while the annual performance evaluation process does enquire about learning interests and needs, the absence of explicit supports for educational activity puts the onus on the worker and/or the supervisor to justify both time and funding in a busy environment. This is noted by the VP who observes "there are a lot of really self-motivated people here" (p. 5). Staff reflect that, on the whole, very little continuing professional education is undertaken outside the Museum. As the Curator notes "...that just doesn't happen. It's not in the funding" (Personal Interview, December 1, 2009, p. 6).

Instead, learning tends to be undertaken on-the-job as needs arise. For example, the Curator indicates that he has gained skills through experience, "…being kind of a museum junkie my whole life…it was sort of though [curiosity and enquiry], so it was a totally non-standard, non-academic way of doing it, which has held up well" (p. 2). The Curator, like many other staff at the HDM, "came to the museum field through the back door" (p. 1). With the exception of Johnson, the VP, and the Education Curator, staff have not had formal education in museum studies. Instead they bring expertise in such areas as design, marketing, or teaching to their specialized positions. While this results in a group that deals creatively with a range of functions, it does not lead to widespread organizational awareness of or affiliation with standardized museum philosophy, principles and practices (VP, p. 8, 12). The VP reflects that, while she assumed during her studies that museum workers throughout the sector engage in discourse about museological concepts and theories, "there is a big disconnect… I thought everybody would be up on the latest information…because there's some really valuable stuff, but no…" (p. 18). When learning at HDM is given priority, it tends to relate to a content area (e.g., history, wildlife, land-use management) associated with an exhibition or collections theme, rather than museological practice. "The content areas are the ones that get the most engagement from staff. When we have talked about…different areas of practice within the museum, that doesn't get as much interest" (VP).

Perhaps due to diversity in professional backgrounds as well the remote location of the museum, C&E and other museum staff do not consistently rely on professional networks in the museum sector for guidance for practice or for CPE. They are not expected to belong to professional associations, and organizational support has not been available for either membership or participation in external activities unless these are initiated to represent the

museum. In such cases up to $500 is provided at the discretion of the President to support a portion of travel costs to conferences, and staff are expected to cover the balance from their personal funds. There is also an expectation that external activities will be undertaken on personal time (Johnson; VP). The VP worries that while the HDM relies on staffs' professional skills, the lack of continuing professional education may lead to "diminishing returns" and goes on to note that "the professional development piece is [limited], I think largely because of time…I think there's definitely a value in getting out of house" (p. 11). Since professional development is not systematically organized, there are no supports for transfer. Such pre-course processes as matching content with work needs and establishing learning goals, and such post-course measures as debriefing and coaching to support transfer have not been put in place.

While C&E staff are enthusiastic about opportunities to do creative work at HDM, they describe pressures to both increase museum visitation and decrease costs as a result of the recent economic downturn. This is because HDM relies on grants, donations and earned revenues to fund its operations. Financial constraints and shifting approaches to programming are identified by several staff as influencing the learning environment. "In economic hard times [professional development is] perceived as a luxury...I think [that] tends to be neglected unless someone really is an advocate for themselves" (Designer, p. 13). Staff understand the importance of change to respond to tight budgets. The Designer comments that "there have been cost-cutting measures that have been very necessary to get us to a place where we're healthy...maybe from that standpoint we can progress on…longer-range things" (p. 4). A strategy to cope with economic pressures has been to increase the number of temporary shows to increase visitation. C&E staff plan, design, install, and maintain up to twelve shows annually. Some of these are developed in-house, while others come as travelling exhibits. This exhibition schedule has been introduced without additional resources. The VP is concerned about the sustainability of the workload. "We've either got to get more staff or more money to rent exhibitions. …it's hard to find exhibits that are mission [appropriate] from the outside, and we don't have the curatorial [scope] here to create them" (p. 6). Johnson notes pressures of time and limitations on creativity."It's hard…we don't have the time to do the research and make the contacts that you need in the community.... We get great ideas, but then we realize there's no way we can do [some projects] in three months" (p. 32).

Interview participants also observe tensions that the intensified exhibition schedule brings to working relationships. Where staff worked collaboratively through all aspects of an

exhibit several years ago, the nature of teamwork has changed so that staff now contribute their specialized expertise to team processes on an as-needed and just-in-time basis. Fully collaborative team approaches "don't exist in my experience anymore" (Designer, p. 12). Instead, teamwork involves "certain people responsible for certain tasks." The Curator also reflects that while planning for exhibitions remains a collective effort, producing them has become less team-based. "You're kind of 'it' sometimes. Right now we're 2 ½ months from *Sin in the Sagebrush* [so] we're all on it, but for a year and a half…they were all on other pressing...things, and I was kind of on my own…"(p. 13). From a transfer perspective, reduced teamwork is seen to limit identification of learning needs and the synergistic exchange of information. Johnson observes this shift in culture, saying "there was a lot more shared learning and creating organizational ties. Now, I think due to budget, there's really not a lot" (p. 11).

A tighter fiscal environment is also seen to impact time for professional development and for related transfer activity. As Johnson notes, "...my workload has increased. I try not to work every weekend.... We [hear about] a lot of...professional development opportunities—I just haven't had time this last year and a half to do much" (p. 3). She also observes that if a learning need is identified, "it's really your own initiative. Right now we don't have organizational [supports]. If you have a go-getter in a department, they're the ones who will try and get it going" (p. 11).

While pressures of change to address environmental issues as well as financial sustainability are perceived as high at the organizational level, low organizational readiness for change, as evidenced by the absence of planning and supports for staff and organizational development, suggests that HDM is likely to emerge on Sessa and London's (2006) organizational learning matrix[13] (*Table 2*: Likelihood of Organizational Change in Chapter 2) as a somewhat limited learning environment in which practices are adapted on as an as-needed basis. In such circumstances, Sessa and London suggest that relatively little generative or transformative organizational learning is likely (Figure 1.3, p. 11), although opportunities for individuals to move forward with new initiatives remain possible.

While a range of creative exhibitions and professional activities may be initiated at the individual level, organizational decisions on their relevance and viability are variably influenced

[13] This matrix, which suggests that organizational learning varies with both pressures of change and organizational readiness for change is described in brief in Chapter 2, p. 71.

by both executive and external stakeholder priorities. For example, Johnson observes that programming priorities are set in the President's office (p. 31). Johnson notes that she was successful in proposing a curatorial project based on her coursework, in part because "our president liked it.... So she said 'okay, write me a proposal. Go for it'" (p. 7). In other instances, Johnson indicates that she has been less successful in bringing ideas forward. She describes several requests that she has made to attend local workshops or to travel to regional museums to build her understanding of local themes and collections that have been turned down due to the costs or time involved. From a transfer perspective, capacity to advocate for approval and support plays an important role in whether and how an initiative proceeds. Johnson exhibits a strategic understanding of transfer dynamics in observing that "...each leader brings different views. You have to adapt to that, as well as to who you're working with" (p. 34).

Another variable in transfer in this climate is the diversity and specialized nature of job design within the C&E unit. The Preparator comments that his day-to-day work varies according to circumstance. "Everything is very, very situation specific. You're making a huge eyeball over here one day, and then...you're trying to figure out how to deal with a specimen that's loaded down with formaldehyde" (p. 9). The Curator comments that "you better be your own task master—and be able to see things, and see what needs to be done, and do it, because no one understands your exhibit enough to tell you what you need to do" (p. 13). Such specialization places the onus on the individual to determine necessary knowledge and skills.

While jobs are inherently diverse and specialized, they are also subject to change to cope with evolving work priorities. As the VP notes "every year there's some kind of movement and shift because [the museum is] so unusual, and because the workload is so heavy. People are always having to assume different roles." (p. 3). This is also noted by the Designer who comments "I still find myself doing...things outside of what that formal job description would be" (p. 10). For Johnson, the recent expansion of her position to encompass the coordination of exhibitions is a positive move: "I've loved the challenges of moving up into exhibits" (p. 12).

The organizational climate for transfer is also shaped by public expectations and pressures. The role of the Museum in animating social or environmental change is generally perceived by interview participants to be appropriate but challenging. The mission of the HDM positions it to create "...learning experiences to help audiences discover their connection to the past, their role in the present, and their responsibility to the future" (HDM, 2009, p. 5). While not prescribing how this will be accomplished, this mission tends to be interpreted as creating a

space in which multiple perspectives are presented in order to allow visitors to weigh different approaches and form their own opinions (p. 11). This approach is characterized as impartial. "We have to be fairly neutral in our message…an objective message that shares both sides of the story" (Designer, p. 9). "It's very much meant to be non-advocacy...because all of these things, whether they're ranching or water or military use of the landscape for bombing ranges , are very contentious" (Curator, p. 10). "We're finally starting to jump into [fire management] a little bit more, and [to] become a place...where we can offer people [opportunities] to present their sides, while trying to remain as neutral as possible" (Johnson, p. 23).

However, the degree to which an exhibition theme, relationship, program or project is perceived as appropriate by external stakeholders also influences the application of learning. The HDM addresses themes that are inherently controversial since they involve conflicting values around land use, wildlife management and social relations. On one hand, expectations of funders play an influential role in the degree to which the Museum is inclusive:

> Our grant for *Art through Ancestry* [required] very specific things we had to follow…we had to work with a minimum number of Native American people from different communities…. They're very strict in those types of roles. (Johnson, p. 34)

On the other hand, conservative funding sources can impose limitations. "For example, with [a recent] exhibit, I know [some funders] didn't like certain things and…kind of edited because they're providing the funding... You have to be careful because it should be the story that we're telling, not what people tell us to tell" (Johnson, p. 34-35). This is echoed by the Designer who observes that it is important to choose the message based on mission rather than funding sources (p. 9).

The VP also notes that the museum tends to avoid highly controversial topics. "That reluctance is borne from the fear of losing funders" (p. 14). Conflicting values are also seen as problematic since both the nearby community and the HDM staff are comprised of people who tend to hold either conservative or progressive viewpoints. "There's a fear of alienation. Within the staff, they're mostly progressive, but there are many conservative people as well, so they'd be [worried] about [a controversial stance]" (p. 15). Johnson reflects that:

> We could do a lot more with the knowledge we all have...if we were given the opportunity…. I think it should be more mission-specific, creating community engagement, helping people bring their ideas forward to show the different views… social, environmental, political, all of that stuff… (p. 34)

Pressures and fears linked with stances that may be perceived as controversial place variable limitations on the degree to which concepts associated with community engagement, social agency, and contentious topics can be applied in this setting.

Summary of organizational transfer factors

As noted, a complex mix of factors shape the HDM climate for transfer. The mission, collections, physical environment, relations with communities, and considerable autonomy within specialized museum functions are seen as positive, even inspirational organizational qualities that create enthusiasm for effective practice along with largely positive attitudes toward the workplace. On the other hand, the absence of consistent organizational planning, tight resources, and limited attention to strategic organizational or professional growth restrict learning activity and provide no formal supports for learning transfer. External pressures to balance conflicting expectations also impact capacity to introduce new concepts and practices. Considered in light of Fuller and Unwin's expansive-restrictive continuum (2004)[14], the HDM emerges as a largely restrictive environment for work-related learning, including learning for transfer, primarily due to the lack of intentional supports for personal and organizational development and the museum's reliance on individuals to attend to their own professional development and performance needs. Fuller and Unwin suggest that restrictive organizations tend to limit the internal exchange of information and are conservative in nature. While HDM does not offer an invitational climate for transfer since learning and the application of learning for professional practice are not actively and systematically encouraged, transfer activity is not opposed. For the most part, if agentic professionals initiate and implement new practices, this environment welcomes and celebrates their successes.

Personal agency for transfer

As noted above, an influential factor that shapes the transfer climate is a mission that inspires staff and encourages innovative programming. Johnson and her colleagues convey a strong sense of affiliation with the HDM and positive attitudes toward their day-to-day work. Everyone I spoke with expressed a genuine pleasure in their involvement in this attractive

[14] My comments are based on an analysis, further developed in Chapter 5, that places the HDM along a continuum between expansive and restrictive qualities in the organizational climate, based an analysis of participants' comments and in light of Fuller and Unwin's descriptions of twenty organizational characteristics mapped in their model. This model is described in brief in Chapter 2 of this dissertation, and in greater detail in *Workplace Learning in Context* (2004, pp. 126-144).

environment. For example, the VP notes that "I've actually always wanted to work here because it's a beautiful place" (pp. 1-2). She also comments "the staff is pretty interested in what is going on. It's nice. They are working really hard and there's a high level of care and passion" (pp. 1, 10). Respect for colleagues is noted by the Preparator. "A strength we have is our amazing people who work here...in some ways we have a lot of people who are over-qualified" (p. 10). Respondents comment on the satisfaction they derive from their creative work with objects, ideas, and external communities—and with one another—and emphasize their commitment to quality. The Preparator, for example, notes that in a single day he might:

> ...make a realistic looking rock, and then...a pack rat den for kids, and then move over here and make an exact duplicate of a trunk [from] 1840.... I love it! It's super-creative. The best thing about this job is that there is such a huge amount of work that needs to be done. (p. 4)

The Curator also sees the scope and challenge of work at HDM as gratifying. "If you can [cope with] the pace, the ever-changing work, the non-profit [status] and the uncertainty of it all, you're given a lot of responsibility to do some very interesting things that other museums don't do" (p. 14). For some, the passion is a response to the collections and their links to people. "I love the stuff! ...I love that every artefact we have has a story to it, has a face to it somewhere in the past. ...it's...learning about different peoples' memories and stories that come through from looking at an object and reading about it and understanding it" (Johnson, p. 5). This perception of HDM as an environment for creative and rewarding work appears to foster generally positive attitudes toward integration of learning if it contributes to the quality of practice.

As also noted, the absence of detailed organizational and performance plans tends to put the onus on individuals to identify needs, initiate learning activities and develop strategies for transfer. As the Curator comments, "I think we're pretty much expected to build whatever skills are needed for whatever project" (p. 3). In this environment, Johnson's accounts of transfer suggest that she brings several consistent characteristics to the transfer process that relate to her capacity and motivation in undertaking learning and initiating change.

Disposition emerges as an agentic factor in both learning and transfer activities. Johnson cheerfully describes herself as "pretty strong-minded" (p. 4) and says that in learning situations "I tend to jump in. I want to get my hands wet. Just go do it" (p. 10). She proclaims her dedication and persistence on a sign outside her office door that says 'fierce but cheery.' Her

enthusiasm for work and commitment to a high standard of practice are evident in all her discussions of learning for professional practice. Johnson's disposition also appears influential in her autonomous commitment to acquiring and applying the professional knowledge and skills that she perceives to be necessary for both effective practice and career advancement. She began CRM in 2002 when a colleague in the small museum where she was doing seasonal museum work encouraged her to take the introductory course. While Johnson was uncertain about the Program at first, she persisted in her studies. "I remember at the time I was a little overwhelmed and a little scared of that because it was totally new. Especially the architectural end, but it was really cool because the projects in it brought me out into the community" (p. 15).

While Johnson started CRM with the encouragement of a colleague, she continued to work on the program independently as she moved to a larger museum. She did not receive support for her studies in this position, but she was comfortable persevering on her own. Distance education had particular appeal as it allowed her to balance work and study. "I thought 'this is something [that lets me] still work.' I just kept going, and just kept working" (p. 16). Her preference for a study mode that is largely self-directed is evident in her comment, "I love setting my own schedule. I love having flexibility in my course choices and directions. And I love being able to apply [my studies] at work and still work." She notes that "as I moved forward in my career, I also changed my direction in the courses I chose. It was a flexible enough program that I could do that". She adds "I so want to go back and do more" (p. 16).

Johnson sees her involvement in CRM as instrumental in acquiring her position at HDM. She notes that the President at the time "saw [the program] on my resume…I think that definitely did help" (p. 17). Initially, her participation in CPE was encouraged by the HDM. "The first year it was great... It just worked out that we were able to get funding to build our new collections vault, which is what my [directed] study was on. Everything fell into place" (p. 18). In addition to giving her confidence in her approaches to her work, "the content [of CRM] actually helped get me excited about my work. I was able to learn new things, apply different techniques and knowledge while at work… So it created more energy at work for me" (p. 16).

Another factor in Johnson's agency in applying learning is the considerable positional autonomy and personal initiative that she is able to exercise in most aspects of her work. When asked about the degree to which her overall work is self-directed, Johnson responds "probably 90%" (p. 3). Her autonomy positions her to make decisions and allocate resources for new practices in those areas that she controls. However she quickly makes a distinction between her

work with collections and her work on exhibitions that involves variable interactions and teamwork with supervisors and colleagues. In the collections component of her job, Johnson indicates she has 'total' autonomy in identifying emergent knowledge and skills associated with her position and in introducing new practices that impact her own approaches to her work (Davis, 2009). She has 'considerable' autonomy in defining her approaches to her day-to-day work, and in introducing new practices that impact the work of others. "It's my realm, I guess, and people don't know enough about it to [intervene]…. It's nice to be able to use my knowledge where I professionally see that it's going to work the best [at HDM]" (p. 37).

Johnson notes she reports to the VP, whose background is in exhibition design. While the VP is seen as supportive, she does not have extensive experience in collections management (p. 27). As the VP comments, Johnson "knows the collections area and what needs to be done" (p. 5). The VP also notes that Johnson is self-directed in her work, "especially in collections because it's locked up. I've found that people who work in those areas typically are more autonomous" (p. 16). The procedural nature of much of collections practice contributes to Johnson's capacity to exercise autonomy in this work. Based on the levels of expertise described by Dreyfus and Dreyfus (1994)[15], Johnson could be considered to be proficient in her work with collections, in that her descriptions of her work suggest that she "sees situations holistically rather than in terms of aspects; sees what is most important in a situation; perceives deviations from the normal pattern; decision-making is less laboured; uses maxims for guidance, whose meaning varies according to the situation" (Eraut, 1994, p. 124). This is likely to give her confidence in putting learning to work as she recognizes the fit and implications of new practices.

Both Johnson's positional autonomy and her expertise in managing exhibitions are more circumscribed. As this is a new responsibility, her level of expertise appears to vary from competent to proficient in keeping with Dreyfus and Dreyfus' (1980) levels of competence: "coping with crowdedness; now sees actions at least partially in terms of long-term goals; conscious deliberate planning; standardized and routinized procedures" (as cited in Eraut, 1994, p. 124). Nevertheless, colleagues observe that she adapts existing knowledge in her new role:

> She's very bright, so even the training that she has had in other areas translates to a new world [of exhibits]. I think that's what happens a lot here. People are asked to expand into spaces and not a lot of assessment [is done] about whether or not that's a

[15] These levels of expertise are described in greater detail in Chapter 2, p. 83.

> place that they are proficient at, that they desire to do....you sort of sink or swim sometimes. (Designer, p. 11)

Johnson indicates that many decisions relating to day-to-day work in this area are made by others in the exhibition team including, at times, the VP and the President. Their interest is, in part, due to the emphasis that is currently being placed on exhibition development to improve institutional profile and attendance. Her supervisor also notes that while Johnson is doing a good job, "she's still learning about the way that exhibits are produced" (p. 17).

While positional autonomy is, to a large degree, a function of hierarchy and collective decision-making patterns, initiative differs in that it describes personal behaviour, and refers to "a self-starting, active and persistent approach to work" (Frese, 2001, p. 100). When asked how often she exercises initiative in the same tasks that are discussed regarding her level of autonomy, Johnson indicates a higher level of personal initiative but emphasizes that she is very "department specific" in setting personal goals (p. 29). For example, while she feels she has considerable but not complete autonomy in defining day-to-day work since her supervisor establishes a number of expectations, she is the sole initiator of day-to-day planning and sets the pace and focus of her work. "I think a lot of it has to do with the fact that museums never have enough staff [or] enough money, and they are always scrounging to do things and get by. So to have that initiative is almost the only way you're going to not only improve yourself, but improve your area at the museum" (p. 14). She goes on to note "in my situation, if it's something I want to do, I have to budget for it...and I have to make sure it's carried out. If I don't bring it forward, it's not on the radar...I think personally I am the voice for that" (p. 28).

Johnson recognizes that she brings a strong work ethic to her role. "I love taking something and seeing it to finish, and going 'okay, that's done. What can we do next?'" (p. 15). She also acknowledges that maintaining her initiative can be challenging. "There have been a few days...that I've felt like [being less active]. I have to just go home and regroup. I get really down from [that kind of] attitude...I have to battle that sometimes and know that there's so much meaning here" (p. 14). When asked to elaborate on the meaning she derives from work, Johnson reflects that "...it's just knowing that we're making a difference in our community, whether it be through exhibits, or wildlife presentations. That people count on us... that gets me through" (p. 14).

She notes that her initiative and autonomy are strengthened by her growing experience and professional knowledge, particularly in advocating for ethical practice.

> I'm a little more mouthy, a little more confident I guess. I will take a stand for not only my personal ethics but for museum ethics and collections...because I have the background knowledge... I think I wouldn't have done that a few years ago. I can walk into the President's office and go "hey, I don't agree with this." I usually can have a decent conversation and come out with a solution-oriented way to deal with it. I'm not afraid to be creative. (p. 15)

Linked with her growing expertise is increasing confidence in tackling new challenges. She attributes her self-assurance, motivation and perception of affordances for transfer to CRM coursework and comments that it has contributed to her comfort in transferring learning (p. 15).

Johnson's agency for transfer is also shaped by her identification as a professional and her engagement with external networks and resources. While she does not maintain her memberships in professional associations and has not had recent opportunities to participate in conferences or workshops, she draws on resources provided by American and Canadian associations, and recognizes the importance of standardized museological policies and guidelines. These provide her with an external frame of reference to round out knowledge needed for some tasks. For example, while collections policies were covered in *Collections Management*, she turned to the online advisory services of the AAM for advice for the situated needs of the HDM. "They have a resource center you can log into and they'll help you. They will send you sample plans and their code of ethics for varying things. They'll even hook you up with professionals" (p. 15). The VP recognizes Johnson's professional commitment, saying "she understands it and I think she really does try to bring the museum to a higher standard" (p. 16).

Summary of agency factors

Johnson's energy, enthusiasm and initiative are influential in the notable agency she exercises in acquiring and applying learning in the context of a largely neutral climate for transfer. The Curator observes that Johnson is "very well read on the issues and the basics from which she can make decisions, whatever it might be within the scope of her role. I think, whether its personality or coursework, [she is] confident and says 'okay, we'll figure it out, we'll do this'" (p. 12). This quality he describes as "grace under pressure." The Designer also conveys a sense of the trust that colleagues afford her. "I think most people assume that [Johnson] knows best. There is respect for her knowledge base and she's very good at disseminating it." This respect is echoed by the VP, who also notes her personal autonomy:

> She cares for everything with a very high standard, but she also understands the pragmatic part of things. If she didn't go the [CRM] program, I think that there would be

> a more relaxed attitude towards collections and [artefacts] would not be cared for in the way we would want them to be cared for. She always advocates...for resources and she's a real cheerleader. I'm not sure that without that training she would have been so much that way. (p. 16)

Transfer experiences

While multiple variables appear to influence the likelihood and process of transfer at HDM, Johnson describes a range of transfer experiences that demonstrate her conviction that all the learning that she gained through CRM has value, either immediately or over the long term. "[My learning] is always there. I might not remember everything, but I can go back…whether you use [it] immediately after learning it, or you go back to it [later], I think those are both very useful" (p. 33). As predicted in the literature of transfer, Johnson's transfer experiences range from near to far, and include instances of broad, vertical, forward and backward reaching transfer, depending upon the timing of coursework and the relevance and fit of learning to the museum's needs. She describes instances of near transfer, generally defined as the application of learning to similar tasks without significant adaptation, in aspects of her work with collections management and preventive conservation: "…the hands-on collections stuff I found very easy" (p. 9). In some instances she engaged in backward reaching transfer to draw on principles that she learned in introductory museum studies and collections management coursework, particularly in her early years at HDM. "I was basically coming in cold, so it was neat to be able to apply some of these [principles] in the courses from the start to a new collection in a new place for me. I applied that knowledge" (p. 18). She continues to make use of those course materials. "For example, we're currently moving all of our rolled textiles into our new collections vault, so I had to go back through some of my course [materials]…to remind myself of the best way to do that.... [My learning is] definitely always there" (p. 30).

In other cases she was able to apply learning concurrently with her coursework and notes that this is her preferred learning style. "That's one of the things that I loved about [CRM]. I could do a lot of hands-on study at work.... I could take an exercise and use collections that we have...and still move forward in my work" (p. 9). She reflects that online coursework allowed her to relate learning to practical applications in her workplace. "The only way I would have wanted to do [courses] on-campus is if there was a museum that you could be...applying the skills. I think you lose a lot from the classes if you can't apply it at the same time" (p. 9). Johnson notes that *Managing Cultural Organizations* was of immediate value in managing budgets. She also comments that *Caring for Collections* enabled her to recognize affordances for transfer:

> ... working with [the instructor]...was an inspiration. She really opened some windows for me into areas in my career...for example, doing conservation work on our stage coach. Taking her course was one of the reasons that I started going for grants...just because there are things that I can do to help preserve these objects, more than just managing them properly. She brought the excitement out for that. You know you think that a conservator is just not that exciting when you see them in their labs. She was such a free spirit.... That really changed my perception of conservation and what you can learn from it. (p. 17)

The application of some learning required greater adaptation and learning. In some cases this was due to the degree to which management was supportive of new practices. "If you are learning...but you can't apply it in that same way, [transfer] depends on the personality of who you're dealing with. Are they going to have the patience to ask 'how can I make this work here?'" (p. 28). Timing is also a consideration in applying learning. Johnson reflects that forward-reaching transfer is at play when she observes that sometimes she reflects:

> I can't do this right now, but maybe down the road...then I can apply it. I have noticed that with adding on the new [collections] vault. There's been lots of different collections storage [strategies in courses] and I can go "now I can take things from that course because now I have a place to put this stuff properly." (p. 29)

For example, Johnson comments that *Human Resource Management in Cultural Organizations,* which she took prior to assuming management responsibility, has made her more aware of museum dynamics and best practices in management (p. 14) and provided her with strategies for supervising staff. "When I took the HR course, I wasn't supervising any staff at the time, but it seemed like it was something useful for future" (p. 33).

Collegial support also influences Johnson's transfer capacity and experiences. She observes that some colleagues have a traditional approach that limits indination to try new strategies, particularly if these involve new management approaches or mastering new technologies (pp. 27-28). Other times, concerns over budget, resources, or lack of market data can inhibit new approaches (p. 28). The Preparator also notes that colleagues approach change in different ways.

> We don't get together as a staff and go through [new approaches] and give each other the freedom and the open-mindedness to try these new things. We have that 'just the way it was done' view. ...the other weakness is just our position of being a not-for-profit with no major endowment or no reliable source of revenue.... If we're all timid or scared by our [financial] position here, then it's hard to move forward.... (pp. 10-11)

While some far transfer has involved adaptation in response to organizational needs, in other instances adaptation of learning is linked with Johnson's own comfort with the underlying concepts. She has completed both the *Human Resource Management* and the *Managing Cultural Organizations* courses, but comments that "the stuff I'm still struggling with is project management—when you have [to work with] multiple personalities…. General management is something I'm still learning" (p. 9). She notes that mastering conceptual and theoretical knowledge "...has always been difficult. It takes me a long time to comprehend it…I need to be doing [a job] for a while to come back to go 'oh, now that makes sense in theory'" (p. 9).

Johnson indicates that growing confidence in her expertise contributes to her comfort in applying learning (p. 15). A particular example that she cites is her interest in initiating an exhibition upon completion of *Curatorship*. In that course, she learned about ways in which exhibitions should serve communities, along with steps involved in conceptualizing an exhibition, involving stakeholders, designing the elements, and developing communication. The following table uses Eraut (2004) five steps in learning transfer to trace the progression of this complex 'far' transfer process and illustrates the multiple organizational and agentic factors at play as Johnson learned to apply her learning within the social context of HDM (pp. 6-8). As well, it suggests a number of critical points at which this initiative might have been halted had appropriate conditions for transfer not been in place.

Eraut (2004) transfer step	**Johnson's transfer experience**
The extraction of potentially relevant knowledge from the context(s) of its acquisition and previous use.	"I loved the *Curatorship* course—it was just so much fun…it was definitely less of a hands-on learning experience and much more of an intellectual and imaginative and personal learning experience…. Taking the course just opened my eyes that anyone can do it if they try hard and they believe in what they're doing." Johnson found the course transformational and highly effective in boosting her confidence and motivation to apply its concepts and principles.
Understanding the new situation, a process that often depends on informal learning.	Johnson recognized that HDM exhibit planning was open to individually initiated projects and receptive to ones that focus on Native American themes. "I don't think I would have had the confidence, without that *Curatorship* course, to try it. I was probably the first one to try curating a [temporary] exhibit in ten years here."

Recognizing what knowledge and skills are relevant.	"The *Arts through Ancestry* exhibit—that was an idea that I had. I threw it out to our Exhibits Team. I knew we had artefacts." While *Curatorship* offered Johnson curatorial principles, she had to consider them in the context of other knowledge. Her theme drew on her familiarity with collections, museum priorities and stories of Native Americans. Her own creativity and vision were invoked at this stage. To gain critical support and resources, Johnson used strategic skills to 'sell' the idea to senior management in a manner that gave them confidence in the value of the concept and her capacity to see it through. "I presented the idea, and [my supervisor] loved it…so she said "okay, write me a proposal. Go for it." "I had great support from our grant writer [so] budget wise, it was good to go. I thought 'okay, let's do this.' Johnson notes that the curatorial process was adapted by the nature of the grant. "…there were very specific things we had to follow….we had to work with a minimum number of native American people from different communities. We had to create opportunities for younger Native American artists. They're very strict in those types of roles" (p. 34).
Transforming them to fit the new situation.	"It [involved] getting to know the Native American collection… which helped me get into learning how to store it better, working with specific types of artefacts, learning how to curate. It was necessary for Johnson to apply concepts without coaching in an area that she knew might involve challenging relations and observance of protocols. "I was very excited…I basically cold-called two of the artists and said 'hey this is our idea…' The *Curatorship* course [was influential] in building my confidence, knowing that [I] could make those connections with the different communities."
Integrating them with other knowledge and skills in order to think/act/ communicate in the new situation	Johnson's ability to tackle this project required integration of competencies from other specializations in order to pull the exhibition together. "…the hands-on stuff from the *Collections Management* course [and from] *Caring for Collections* [was useful]. Laying out the cases and what artefacts and how to put them out properly, I could do all that. I didn't need to bring anyone in to do that, whereas a lot of curators would want to bring in a collections manager." "As a curator, [Johnson] was on top of things. …When she came together with the rest of our team, she let us do what we do best. …she is a [wonderful] curator to work with" (Preparator, p. 12). Strategic knowledge gained through prior experience as well as through coursework—and perhaps from collegial relations—was instrumental in transferring curatorial principles and practices.

Table 6. Johnson's transfer experience

Just as Johnson describes multi-faceted situated learning to support the application of content from *Curatorship*, she indicates that the process of developing her curatorial project has shifted her overall approach to work in the long-term, particularly in dealing with the exhibitions component of her job. "What I find…is now I'm doing [project management] with other peoples' projects because I know [what happens at] crunch time. I say 'okay, this is when you need this done.' That's been really helpful for our work flow" (p. 8). On a more conceptual level, she recognizes that she thinks differently about the role of the museum in telling peoples' stories

and regards the *Curatorship* course as influential in building her understanding of and commitment to more socially engaged practice. She continues to seek affordances for further applications of her knowledge and skills. “Whenever I talk to people, I’m thinking about their ideas and connections and what else can I do with this. What other ideas can I find? What other stories can I represent? What about the people? ...That’s totally a long-term thing” (p. 7).

Reflections

Johnson’s accounts of her experiences in transferring learning from CRM to her work in collections and exhibitions at the High Desert Museum reflect the relational interdependence of the organizational climate and her personal agency. The strengths of this mid-sized museum environment for transfer include its ambitious collections and exhibition mandate which inspires a strong sense of organizational affiliation and encourages, even demands, creative, innovative and self-directed work. The primary shortcomings, from a transfer perspective, are short term organizational and performance planning timelines that do not encompass expectations for work and skill requirements, and the absence of policies and procedures that might guide and provide support for both learning and transfer. In this context, Johnson’s personal commitment to learning and professional practice and her energy and enthusiasm for new challenges prompt her to initiate transfer processes and negotiate within the organization to achieve what are often self-defined goals.

Although Johnson indicates that some of her learning had immediate application while other aspects were either not relevant or have had to be applied over the long term, she does not perceive learning transfer to be an issue for her or for her museum.

> I’ve never thought about this as an issue….I got more out of some courses over others, just based on my own experience and what I’m interested in. …maybe I didn’t learn a lot at that time of the course, but I have resources to go back to it when I need it. I think that’s been really a blessing for working in our environment...because it’s… always there. (p. 33)

Just as Johnson is not troubled by the lack of direct applicability of her learning, she does not draw a link between the outcomes of her learning and the costs and time that she devoted to the completion of her Diploma. “I think every job and career change, you’re going to use different parts of it. That’s how I looked at it when I took the courses...it’s like ‘where do I see myself going, and what would help me get there?’” (p. 34). She adds “I don’t think there is

any course that I regret taking or spending time or money on. At this point, I think it was all very useful." Johnson concludes that she feels that her studies have been well worth her investment.

> I can't say enough about the program. That's not bragging for you guys. For me…to have flexibility and supports [was wonderful]. And always having it there and knowing that ten years from now, if I completely forget…something, I can go back and find [it] ...always having that there and the connections that you make from it... I know that if I go anywhere else after the HDM, that's going to be useful. That, to me, is a successful program. (p. 35)

Fortress of Louisbourg

Ruby Fougère's experience in applying learning from CRM to work at the Fortress of Louisbourg (FoL) has not only strengthened her collections management practice, it has shifted her role and scope of influence in Canada's largest historic site. She tells an engaging story of how learning about curatorial work involved her in an exhibit of chocolate pots and cups. From there she partnered with colleagues to write an academic paper on uses of chocolate in 18th century domestic life (Lane Jonah et al., 2009), participated in an historic chocolate conference, and built a relationship with the Mars family of Mars Bar fame to develop authentic chocolate products for the Fortress. At the same time, learning from the CRM *Public Programming* course prompted her to step outside her normal collections management role to plan a 18th century kitchen for culinary programming, resulting in a trip to France to coordinate a feast celebrating the arrival of a tall ship from Louisbourg. This, in turn, led to a temporary work assignment to develop culinary programming for the Fortress as part of a new visitor experience initiative, and involved her in strategic planning for the Site (Fougère, Personal Interviews, January 13, 14, 2010, p. 5). When asked about her experiences in learning transfer, Fougère is happy to reflect that "I find that…one way or another it gets applied. It may not get applied right away, but at some point in time, you use skills…that help shape the overall workplace for the better" (p. 11).

While not all Fougère's transfer experiences are as complex or career-changing as those linked to culinary matters, she also offers multiple accounts of how her CRM participation has led to improved collections management, involved her in planning for the Fortress, and strengthened her capacity to tackle new challenges. Accounts of these experiences reflect both the factors that shape conditions for transfer and highlight the critical role that agency plays in Fougère's efforts to make use of learning.

Fortress of Louisbourg sits on the Atlantic coast of Nova Scotia. It includes a cluster of meticulously reconstructed buildings that provide "a series of experiences that set a mood" (Parks Canada, 2009a) for its living history presentations of this fortified 18th Century seaport. As well, the site preserves archaeological evidence of the original town site and one of the world's largest undisturbed 18thC battlefields. As one of 167 National Historic Sites run by Parks Canada (PC), it is nested within the Cape Breton Field Unit, and receives policy and management direction from multiple directorates headquartered in Ottawa. It can be considered to be highly complex (Broad, 2005) in that its parent organization is comprised of relatively independent components (parks, historic sites, protected areas) along with supportive directorates. These share common goals and work interdependently. While they share a chain of command, relations among and across some components are linked by lines of influence.

Because FoL employs over 60 continuing and 250 seasonal staff, this case focuses on Fougère's working group as its unit of analysis. The Cultural Resources Management Unit (CRMU) is responsible for management of heritage resources, including buildings, archaeological sites, and collections of historic and reproduction objects that furnish the buildings. Fougère is a mid-career professional who has "...had twenty wonderful years here, working with wonderful people" (p. 11) in her position as Collections Technician. In addition to Fougère, I talked with four colleagues including the Conservator, the Historian, Fougère's supervisor who works as Curator/Collections Specialist (Curator); and the Manager of the CRMU (Manager).

Organizational climate for transfer

Complex characteristics shape the receptive, if highly regulated, climate for transfer at this large historic site. As a localized unit within the vast Parks Canada Agency, the CRMU[16] at FoL is subject to goals, policies, procedures, employment conditions, organizational structures—and performance guidelines and competency expectations—articulated to systematically plan and manage 42 national parks, 29 marine conservation areas, and 167 national historic sites across the country. Almost all the rules, guidelines and cultural norms that influence the nature of CRMU work, from job design to employment practices to cultural resource management principles and specialized approaches, are established remotely from the site[17].

[16] While the CRMU at Parks Canada and CRM at the University of Victoria share the same name and focus on similar principles, CRM studies are not aligned with qualifications for practice in Parks Canada.

[17] Parks Canada describes Cultural Resource Management as "generally accepted practices for the conservation and presentation of cultural resources founded on principles and carried out in a practice

Parks Canada's service and stewardship mandate is to conserve and present "nationally significant examples of Canada's natural and cultural heritage, and foster public understanding, appreciation and enjoyment in ways that ensure the ecological and commemorative integrity of these places for present and future generations" (Parks Canada, 2009b). This mandate is notably present in CRMU workers' understanding of their day-to-day work. Fougère observes that she works for the people of Canada and cares for heritage resources that are of national importance for future generations (pp. 4, 9, 12). The mandate sets the stage for the Cultural Resources Management policy (1994a) that determines how heritage resources are identified and cared for across the system. Out of this carefully structured corporate framework of goals, policies and procedures come the guidelines and expectations of CRMU practice at the local level. Collections care, handling, research, storage, and documentation guidelines are all articulated as 'directives' to guide on-site practice in accordance with external professional standards. In this context, both the size and complexity of the overall system make it challenging to introduce practices at the local level if they are not consistent with established procedures. Fougère notes:

> You've got…policies and practices that feed into what you're doing here at the ground level. It's not...easy to incorporate [new practices]... because…it's a bureaucracy and you can't just go out and do something that a smaller museum can do.... Sometimes that's frustrating. Sometimes it takes a little longer to get to the end result. (p. 11)

The degree to which local practice is remotely controlled is echoed by the Manager. "It's a government agency. Many times a young creative professional...gets shocked that they can't do this, they can't do that. There are very strict protocols, guidelines and standards to follow" (Manager, Personal Interview, January 14, 2010, p. 4). However, since he is also involved in policy development across the PC system he observes that "we have the largest CR team across the country…. We are the leaders. We carry the [Cultural Resources] flag…we're looked upon as innovative" (p. 13). He comments that it is up to the CRMU staff to advocate at the senior management level and among other working groups, such as engineering and visitor experiences, for CRMU best practices since the cultural resources are the heart of the site: "...that's [our] responsibility whether it's stated or not. At the same time, a professional has to be able to work within the parameters that are laid down—there's the challenge" (p. 5).

---

that integrates professional, technical and administrative activities so that the historic value of cultural resources is taken into account in actions that might affect them. In Parks Canada, Cultural Resource Management encompasses the presentation and use, as well as the protection, of cultural resources (Parks Canada, 1994).

Because it is part of a self-sufficient well-resourced national system, another factor which appears to influence transfer at FoL is the degree to which staff are isolated from the external museum community and its discourse. Fougère regards herself as a professional within the PC context and expresses commitment to a high standard of conduct. However, like her colleagues, she is not a member of professional associations and does not tend to interact with external professionals in similar positions. The only colleague that I spoke with who participates in an external community of practice is the conservator. As the Curator notes, "we're more inclined to associate ourselves…with other parks and then other large national museums…we've been a little bit on the standoffish" (Personal Interview, January 13, 2010, p. 3). He also observes that the specialized interpretive period and nature of the Fortress tends to limit relationships with other parks. This inward-looking approach appears to limit local awareness of evolving skills and knowledge that are shaping professional practice more generally. At the same time, it constrains employees' understanding of PC standards and guidelines within broader norms of practice. The Curator, who completed a 1992 CRM course, comments that "one of the very useful things with the *Museum Studies* course for me was to see that these [practices] were not just peculiar to Parks Canada…. These are generally accepted museum practices" (p. 3).

The corporate context shapes the climate for transfer in other significant ways. Systematic strategic, master and annual planning establishes goals and objectives for the Fortress as a whole, and provides sanctioned frameworks for decision-making, business planning and performance expectations. These plans also map out local approaches to the significant system-wide changes that Parks Canada is implementing to shift site relations with local communities and to strengthen public support and annual visitation. The implications of increased emphasis on visitor experience for the CRMU, for example, is noted in the 2010 Draft Strategic Plan which directs that the unit's focus on development of an "18th century immersion experience... may include experiences such as cooking on an open hearth, working in a forge, tending a period garden, being a soldier for a day" (Parks Canada, 2010, p. 27). It is projected that this approach will help to address a worrying 30% decline in visitation over the past decade.

Organizational emphasis on planning determines work priorities. While forward-looking, management plans are not accompanied by a gap analysis that identifies training required to achieve goals. "I've never been in a situation where someone has said 'well if you're going to perform this function you're going to need this education or this experience'" (Conservator, Personal Interview, January 13, 2010, p. 7). However, systematic planning makes the Fortress

and the CRMU receptive to new knowledge and skills as long as they are aligned with needs. At the same time, such plans inhibit introduction of initiatives that have not been formally recognized and allocated resources. Fougère notes that when she became enthused with community consultation processes after her *Building Community Relations* course in 2005, the Fortress was not receptive to such initiatives. Now that both the Parks Canada Agency and the site recognize that "relationships—especially on the local community level—are key to the long-term sustainability of the Fortress of Louisbourg" (Parks Canada, 2010, p. 28), she is positioned to engage in backward-reaching transfer to play a lead role in community engagement.

Yet another characteristic of FoL which impacts climate for transfer is that staff in the CRMU, as well as other working groups across the Fortress, tend to be long-term employees, working in secure positions that are conservatively defined within collective agreements. As such, there is little pressure to continuously develop skills in order protect job security. Fougère regards colleagues' longevity in their positions as evidence of the passion, commitment and positive attitudes that many hold for their work (p. 12). At the same time, comfort with existing knowledge and practices and a degree of resistance to change are observed by the Historian:

> There's a lot of satisfaction with [existing knowledge] and a compartmentalization of functions. [They say] "this is the job that I do; this is how I've done it all along..." but there's a very personal element to how one does one's job and that becomes a little harder to move than other things. (Personal Interview, January 14, 2010, p. 12)

While CRMU staff describe their relations as collegial and mutually supportive, the organizational structure and the physical layout of the Fortress tend to isolate one working group from another, thereby limiting cross-functional synergies (Conservator, p. 7; Manager, p. 7) that support the internal transfer of knowledge. In order to strengthen working relations, senior management is developing strategies to bring people together in integrated work spaces. By improving communications, the Manager hopes to build trust, strengthen creativity and encourage boundary crossing. "We have…to create a workplace that [encourages] a cool way to empower people, so that they're not afraid to come forward, that their ideas will be taken seriously...that takes years" (p. 7). He calls for cross-functional understanding because "there's a level of learning that needs to go on just about the organization...we cannot function as a family if the brothers and sisters don't know what each other is doing" (p. 8).

An overarching commitment to learning contributes to a generally supportive—but not proactive—climate for learning, if not explicitly for transfer, at FoL. Parks Canada emphasizes

the role of learning in organizational and individual performance and in job satisfaction and career progression in its *Learning Strategy* (Parks Canada, 2005). This report was developed to "create a dynamic learning environment for individual and organization excellence in achieving our mandate" (p. 1). It notes that "at the centre of change and learning are engaged staff, committed and passionate not only to their work and profession, but to the organization" (p. 3).

The *Learning Strategy* offers a Learning Competency Framework that sets out the degree to which senior and middle managers, supervisors, and knowledge workers[18] are differentially expected to master knowledge and skills. This document has paved the way for the creation of the Leadership and Learning Team to guide implementation of a range of strategies. Among the key goals are further development of a training network; partnerships and instructional strategies to maximize the training efficiency; development of leadership competencies; employee learning plans linked to performance appraisals and career aspirations; coaching and mentoring to facilitate the transfer of knowledge from retiring employees; and integration of learning initiatives within corporate and business planning. A particular priority is to strengthen supervisory skills since the 2003 Employee Survey highlighted "a perception that managers lack the necessary people skills to lead and motivate the workforce" (Parks Canada, 2005, p. 1). Aside from noting the importance of maximizing the effectiveness of training, the *Learning Strategy* does not reference learning transfer as a process or a priority.

The *Learning Strategy* reinforces a long-term commitment to training as a means of building awareness of corporate vision, culture and values and principles, and strengthening employees' skills in a wide range of practical tasks. Such training is frequently offered on site, at the Regional Service Centre in Halifax, or across the system. Employees are aware that approximately $500 per employee is budgeted annually to cover in-house or external learning activities, and that PC will cover additional amounts as required (Conservator, p. 5). Fougère indicates that she has attended many useful PC training workshops over her twenty year career. She notes that all employees are required to take prescribed courses. "...you get CRM training on policy...that's important because people need to understand why we're doing it. If they don't understand why, then they really wouldn't have a lot of perspective as to why they're doing anything" (p. 16.) As well, she has completed online courses in budgeting, finance and supervision. "If I need something, it's there. They don't have a problem supporting me" (p. 2). She observes that technical practices gained from PC training tend to be easily applied.

[18] 'Knowledge workers' are the specialist staff who perform the work under the direction of supervisors.

"We...change tags, rearrange storage rooms, move things away from a wall or...to another room. Any training that we get like that, we put into practice" (p. 22). The Conservator reflects on an assumption that training will be applied. "If they've given you the training, it's because they want you to use the training. If you've got their support, then they expect the follow-through" (p. 14). There is evidence that when learning is undertaken it is applied on an as-needed basis, and there is little evaluation or follow-up to determine specific outcomes or benefits from training investments.

The *Learning Strategy* is intended to make learning more strategic. However, current approaches are critiqued by the Manager as not being sufficiently holistic:

> We've not had a good history of learning, we've had a decent history of training**.** I'm separating the two. I'm not convinced we've been given the appropriate training to achieve the learning that we want…. The whole business of providing staff with training needs to be overhauled. It's got to be looked at in a totally different way. (p. 8)

Fougère's supervisor notes that while training is plentiful, it tends to stress *how* tasks are to be undertaken rather than *why* they are appropriate (Curator, p. 12). He also observes that much organizational emphasis on learning is to support the historic themes of the site. "...as far as history and curatorial things…learning is encouraged and is praised and lauded, but as far as knowledge of how we should be doing what it is we do, [this] hasn't had much in the way of a high profile here" (p. 12). While the *Learning Strategy* sets the stage for a consistent and strategic role for learning throughout the organization, the principles and initiatives it outlines are still being rolled out to field units with the result that its application is inconsistent at the ground level. None of the CRMU staff that I spoke with are familiar with the detailed learning expectations set out in the *Learning Strategy*, and all note that provisions for learning are not evenly implemented. For example, while there is an expectation that all supervisors will work with employees to create learning plans, "...the extent to which it gets done may be a little iffy…. I don't think that aspect of our organization here is very strong…. You know, sometimes a manager will be enthusiastic about that but more often, no, not so much" (Curator, p. 9).

Inconsistent planning for learning and non-existent planning for transfer places the onus on the individual worker to identify and initiate learning that is valued in their practice, and to then implement the resulting skills and knowledge. The Historian reinforces the key role of personal initiative in professional development. "I would say my learning is probably 95% [initiated] by me" (p. 12). She also observes that "...there is an expectation that professionals

will keep their own learning plans moving forward…[but] I would say that there is not really a specific articulation of a need to develop [knowledge and skills]" (pp. 9-10). The generally receptive but unstrategic approach to learning supports is noted by Fougère's supervisor:

> If you have the interest and the initiative...[you can take] pretty much any kind of a course and if that can be seen to be a benefit to the institution here it will be paid…. If personal initiative is not a part of that, it's very seldom [a supervisor] will…say "this is something you should take, this is something you should study"...I haven't seen a lot of that. (Curator, p. 9)

He also comments that Fougère should have a learning plan. "If she expressed...an interest in a particular field…then a learning plan…could be developed from that. For the most part, I do believe that the initiative needs to come from the individual. It hasn't been coming from management down" (p. 13). Given the organizational reliance on personal initiative for learning, the Conservator notes that not all staff engage in CPE or play leadership roles in introducing new practices, and speculates that "maybe it comes down to personalities" (p. 4).

Summary

The CRMU group specifically and the Fortress of Louisbourg more generally offer a stable and benignly supportive environment for learning that can be characterized as moderately expansive on Fuller and Unwin's continuum of conditions for workplace learning (2004). On one hand, FoL shows strengths in its commitment to training for all staff and its capacity to retain staff for extended periods in positions that enable them to master requisite skills and knowledge in gradual ways. Other strengths include clearly articulated expectations for practice, and comprehensive planning for organizational development and change. On the other hand, it tends to restrict learning through the absence of cross-functional training and relations. In many measures on the Fuller and Unwin continuum, it is difficult to clearly identify particular strengths or limitations since, while Parks Canada aspires to an expansive learning environment, many of the desired conditions—such as thorough performance planning linked with learning– are not yet implemented in a systematic manner at the local level. Sessa and London's (2006) matrix of pressures for change and organizational readiness for learning offers an interesting way to consider shifting interest in learning and transfer at FoL. Staff comment that new management is implementing changes in approaches to decision-making, community relations and visitor experience. As pressures for change in the environment grow while

readiness for change also develops, Sessa and London's analysis suggests that this environment will be increasingly receptive to learning as a means of achieving organizational goals.

The strengths and limitations that make FoL a moderately expansive learning environment also shape climate for transfer. While professional practice is valued, and while planning sets the stage for innovation, explicit support for the use of learning is not in place. In this supportive but undirective environment, Fougère exercises considerable agency in her pursuit of learning and her commitment to the transfer of new concepts, knowledge and skills.

Personal agency for transfer

Positive attitudes and enthusiasm emerge as influential dispositional and motivational factors in Fougère's accounts of transfer experiences from CRM coursework. From 1994 performance evaluations to colleagues' observations in 2010, Fougère is described as conscientious, trustworthy, energetic, committed (Parks Canada, 1994b), confident, outgoing (Conservator, p. 12), "very motivated to see that the collection is used in a positive way in the presentation" (Historian, p. 15), and "an unstoppable force" (Curator, p. 16). "There are a couple of things playing into [Fougère's] favour here. She's high energy, she's creative, she's witty, she has fun in her workplace. And she's generally…able to communicate what she feels is important…she moves forward, she keeps going, that's her personality" (Manager, p. 11). Fougère's commitment to using learning to strengthen practice is evident in her comment that:

> I like to learn and if I'm doing a job or if I'm immersed in something, I like to know everything I can… If something fascinates me, I will delve into it and will say "okay, if this is it, how does this over here affect that? What about these few things? How does that work into this?" I have a lot of energy. If I put my energy into one spot, I'll say "how many ways can I look at this project? How can I share this with people? How do I bring people in to the project? (p. 8)

Her sense of affinity with FoL and its collections also influences motivation for effective practice in her work with the CRMU as well as in her temporary assignment with Visitor Experience.

> ...I love working with the collection. I love how the objects tell little stories…. I love talking to the people about the collection. I love interacting with visitors. I like the planning. I like the people I work with…. Twenty years goes by in a flash—I can't believe it's been twenty years when you really enjoy what you do. ...if you really focus on something and you put your heart and soul in it and you've got good people around you, you're going to excel. (p. 11-12)

Fougère's position as a collections technician provides her with capacity to exercise somewhat limited autonomy in her day-to-day work. In responding to the Autonomy scale (Appendix C) administered as part of the interview process, she indicates that she has considerable autonomy in day-to-day work and in identifying the knowledge that she needs for practice, but moderate to low autonomy in introducing new practices, particularly if they impact the work of others. Her responses to the Initiative scale (Appendix C) however, indicate that she frequently initiates learning and actively advocates for its use both in her position and more broadly in the organization.

Fougère's commitment to effective practice is also seen in the degree to which she exercises both personal autonomy and initiative in undertaking further learning and applying outcomes. Her decision to take coursework was self-initiated. She indicates that she needed "a better handle on the basic principles and practices of CRM.… It was something that really interested me" (p. 18). She began by taking the Canadian Museums Association correspondence course. "I just sort of took that on my own initiative... They were very happy…that I had taken this initiative myself" (p. 1). While she enjoyed this course, "...even then I thought 'that wasn't enough; that was just sort of a taste' and I thought it was important to have some sort of paper…" (p. 18), so she researched options for further study that allowed her to stay on Cape Breton. The CRM program was recommended by a colleague, and she chose to do all her coursework online. "I really enjoyed online coursework because I could sit by myself and write. I could...start something and then come back to it if I'm not thinking clearly. Those are all things that I enjoyed" (pp. 16-17).

In addition to being self-directed, Fougère's descriptions of transfer indicate that in many instances, her personal initiative has been instrumental in instigating a transfer process and persuading others to join in. As her Manager notes:

> ...she's not being asked to be creative [in her position]…she could have stayed in that job…forever and ever, amen. However, because of her personality and her desire to move on and do creative things, she…chose to go to the program that you offer and when she came back from there that was like throwing fuel on the fire. It gave her new ideas…when she finished the program she was floating. She had all this stuff she wanted to try and go forward with. That's a very positive thing. That's what you like to see all your employees do, but it's not possible for all employees. They don't have the basic kind of drive to do that. So it's not everybody that can come back from the training program and apply it and be successful. (p. 12)

When asked how Fougère approached the application of learning from CRM, her supervisor notes that, at times, the larger challenge was restraining her enthusiasm to ensure that new initiatives fit existing priorities (Curator, p. 11). He comments that she developed:

> ... good understanding in her aptitude or of the issues…and she began to make proposals for creative solutions to issues. She began to be invited by managers to participate in…planning or vision exercises. [She]…has benefited personally to…a high degree, from her better understanding of what it is she does for a living…. She has a great deal more in the way of opportunity, partly because of her own enthusiasm and her work ethic, but in very large measure as well as a result of formal training. (p. 15)

As Fougère is largely self-directed, the courses she has completed through CRM span a range of topics that go well beyond the immediate needs of her position. She notes that selection of elective courses was based on understanding of short and long-term learning needs.

> I thought the courses that I took would help me with my job skills…. When *Public Programming* came up I thought "that's a really good one, I want to understand that process since we do have interpreters, we are a living history museum"…. *Conserving Historic Structures*, absolutely. *Managing Cultural Organizations*, I thought "oh yes, I should have a management one…to understand the processes around that." (pp. 21-22)

Fougère comments that all of the courses she took were pertinent to her needs. "I thought that everything related to what I was doing... I thought the issues and the assignments in them were very well thought-out as well. They related to [job] concerns and what people would want to know to continue a career in the museum field" (p. 22).

In Fougère's position she supports the Curator in managing the seasonal furnishing of the reconstructed buildings and ensuring that the collection is appropriately handled, documented, and cared for. Such tasks tend to be procedural, following protocols established by Parks Canada, and implemented in situated ways at FoL. In these tasks, Fougère's transfer processes appear to be relatively straightforward, as long as the content is aligned with needs, since she has the autonomy to make a range of decisions about collections handling.

However, as noted, both Fougère's disposition for learning and transfer and her course experiences have served as catalysts for an expanded role as she perceives and responds to organizational affordances. "She could see where there were...gaps, things that could be filled in there, based on her increased understanding of public programming. And she wanted to...fill some of those gaps" (Curator, p. 14). Others also observe her capacity to perceive opportunities to apply newfound knowledge and skills. "...she is so motivated that if she sees a need, she starts to try to address it. If she sees a possibility, she goes towards it" (Historian, p. 15).

When Fougère is enthusiastic about crossing boundaries to respond to affordances outside her immediate position description, several transfer considerations emerge. One is colleagues' receptivity. At the senior management level for example, her knowledge, skills and enthusiasm have been welcomed since they fit with emerging priorities. Even as Fougère has been learning about the benefits of stronger relations with community and more meaningful visitor experiences, the Fortress has been moving in these directions in keeping with Parks Canada priorities. Both her knowledge and commitment to these concepts have positioned her to perceive the relevance of these concepts, to recognize timely opportunities for action, and to advocate with some confidence for initiatives that are aligned with emergent priorities. As a result, she is being entrusted to lead both visitor experience and community engagement initiatives. The Manager recognizes that this does not align with hierarchical work silos and has the potential to create friction, but he emphasizes that the holistic vision that Fougère brings to her role is appropriate to an emerging conception of cultural resource management that integrates both curatorial and visitor experience elements.

Nevertheless, overlaps with other staff require careful negotiation of sensitivities and priorities. Her supervisor comments that if staff are interested in taking on tasks in others' areas, "then we have to do it in a way that includes folks who should have thought it themselves" and if problems emerge "you just smooth it over as well as possible" (Curator, p. 15).

Linked with Fougère's success in exploring broader applications for learning is a growing sense of confidence and self-efficacy. She attributes this to understanding of theoretical frameworks, to case studies that illustrate effective practice, and to mastery of concepts that strengthen both her authority and others' respect for her work. "Those courses really did give me a foundation and credibility" (p. 15). She comments that if a colleague questions her perspective, she can draw on her learning to assert her position. "I find that you can give a better answer and you can have better dialogue. You can talk to people in a more meaningful way, not just 'oh I think, I think, I think.' You can say, 'I know, I know.' That's comforting" (p. 15).

> My level of confidence and ability has gone up because of the foundation of the knowledge that I've gained and also the experience…. Sometimes you get a little excited and a little nervous when you're trying something or doing something for the first time, and you look for a lot of guidance in that to make sure that you're doing it right. I think that's a very intelligent move (laughter) because to go off on your own direction is never a good idea… The second time it's a little easier. And it gets easier after that. (p. 29)

Fougère goes on to note that growing confidence and knowledge of theoretical frameworks for practice in her work enable her to participate more fully at work. "I will tend to give my opinion if asked...I might not have before. It's a fresh perspective.... It might be something that somebody's not thought of yet. Or if they have, it's a new spin on it" (p. 29). Others observe that the enthusiasm that Fougère brings to her work has been focussed through her studies. "She sort of blossomed...it gave her confidence in what she was saying. Like 'that is a good idea, and now I know *why* it's a good idea'" (Conservator, p. 12).

Summary

Both her comments and the observations of her colleagues indicate that Fougère exhibits considerable agency in both learning and transfer. Energy, commitment, vision and initiative are all evident in accounts of her approach to the application of the diverse knowledge and skills gained from CRM participation. On the Dreyfus and Dreyfus (1980) continuum of expertise, Fougère clearly sits as 'proficient' in her collections management competencies in that she is able—and has sufficient autonomy—to adapt rules or maxims to the situated needs of the collection and the site (Eraut, 1994).

> It's straightforward because I don't have a problem. Sometimes I can consult with others; that's out of respect for…the chain of command. But normally [my supervisor] and I can just have a conversation and say "okay, this painting, I think it should be moved because of what I've learned …Here are the…repercussions if we leave it here" I have...stronger confidence…after going through CRM, that I didn't have [before].

At the same time, her accounts of challenges encountered in learning to use her visitor experience and community engagement skills suggest that in these areas she is moving from 'competent' to 'proficient' in that she is very attentive to the procedures that have been set out in coursework and within the organization, but has an holistic vision of processes and outcomes and is comfortable with adjusting procedures to suit the situation on hand.

Learning transfer experiences

While participants observe ways in which learning could be better supported at FoL, they don't tend to perceive gaps between learning investments and ways in which learning is beneficial in work. Their comments indicate that when learning is undertaken it is applied on an as-needed basis and there is little follow-up to determine specific outcomes from the training investment. Participants expressed surprise when told that transfer literature reports that the

workplace application of knowledge and skills gained in professional education classrooms tends to be limited to 10-30%. The Conservator, for example, comments "I'm startled by that figure and am...wondering if that is [specific to] private industry?" (p. 14), since she had not personally observed problems in applying learning. Fougère comments "Wow! I'm sort of blown away at that figure. I thought it would be much higher than that, much, much higher than that" (p. 16).

The notions that time and adaptation are often required for transfer runs throughout Fougère's accounts of transfer experiences. Just as training from PC workshops tends to have direct application, so some knowledge and skills gained from CRM align immediately with her work. "[Often] there was something that we could apply right away...I'd come in and say 'we could be doing this, or we could be doing that'" (p. 23). She notes that her capacity to apply new learning "depends on which job I'm in. It's easier to put knowledge to work with regards to storage requirements and the way you handle artefacts.... If it relates to the job that I'm doing, then I can apply those principles and practices at that point in time" (p. 35). She also notes that there are times when logistics slow the application of new practices, even if they are an appropriate fit with needs.

> ...sometimes I'd be saying "oh we need to do...," and the response would be "yes, we can do that if we do these three things first..." or "we can't do that this year because we don't have the money, but as soon as the new year comes, we'll look at that." (p. 23)

Fougère comments that her assignments enabled her to develop knowledge that was of immediate benefit. During *Conserving Historic Structures* for example, she prepared a Statement of Significance and a Historic Structure Report on the building in which she was working, following generalized guidelines provided in the course materials. In addition to raising her awareness of construction techniques and of issues that impact structural conditions, her report was utilized by a restoration architect who was brought in to prepare similar documents.

> She said that the report was very good and I had done the foundation work for her. ...I had started to record how water was coming in.... We had a wonderful conversation... that made me feel happy. It helped her [and] my report got appended to hers. (p. 14)

This experience also increased her appreciation of ways buildings impact collections and her perception of other affordances for the application of her knowledge. "I'm going 'okay, I know water is coming in from here, so we need to do these few things to mitigate what goes on.' It makes me look at how we store the whole collection" (p. 14). This content also broadened her thinking about buildings. "It makes me look at heritage buildings in general; it

makes me stop and think 'okay, what is the value in this building? ...Is it in the architecture? Is it who owned the house?' I've always got these things in the back of my head" (p. 14).

While Fougère cites multiple instances in which collections-related learning was applied in a straightforward and timely manner, she notes that concepts that relate to activities outside the scope of her CRMU position have taken longer to put to work. Ideas that interested her relating to community engagement, public programming, and management raised her awareness of activities across the Fortress and prompted her to become involved as opportunities presented themselves. Her enthusiasm and capacity for an expanded role have significantly shifted her work at the site. A particular example of the complex elements involved in the 'far' transfer of her growing knowledge of collections and public programming is the gradual shift in her work responsibilities from collections to visitor experience as she moved to her current role with culinary projects.

Fougère began her involvement in culinary matters by focussing on the material culture of chocolate, stimulated through coursework and experience with collections management. She made a transition to perceiving chocolate and other culinary topics as an appealing and relevant part of visitor experience. In doing so, she drew on *Public Programming*. As the Curator notes, "[she] is a very very enthusiastic individual and portions of the *Public Programming* course she took… she found quite inspiring" (p. 10). The Manager also observes that she ventured into this new area at a time when FoL was encouraging innovation. "[Staff are] being told they can do new things…she's picked that up much quicker than others" (p. 11). Her energy and enthusiasm resulted in her special assignment, which enabled her to travel to France to coordinate culinary events including a banquet to celebrate the visit of a tall ship from Louisbourg. The work that Fougère and her colleagues have done on chocolate and culinary visitor experiences are noted in the current drat Management Plan as "notable successes" (Parks Canada, 2010, p. 16).

Working on chocolate and culinary projects requires Fougère to persist with long and complex learning and transfer processes as she applies emergent principles in public programming. It also generates controversy among colleagues who wonder why she is working outside her collections position (Curator, p. 10; Historian, p. 15). "No one [else] thought of it. [Fougère] sussed out all the contacts…she was the head cheerleader and carried the baton forward all the time. I know at times she said it was like rolling a ball up a hill, like pulling teeth, it was just dreadful at times, but she kept going" (Conservator, p. 13). The Curator notes:

> ...there hasn't been much in the way of positive regard for new knowledge [in programming]. We're still quoting Freeman Tilden[19] and I haven't seen any attempt to acquire new skills... I think that the folks on high in the new Directorate...have been reading all the stuff and are up on the latest thing. There's not much in the way of regard in this site for the material.... I have the impression that much of what's being done [is] not being presented as well as it could be... (p. 11)

Although Fougère is aware that some colleagues may feel marginalized in new initiatives, she expresses confidence that her efforts will be integrated within the evolving Visitor Experience unit over time (Fougère, personal conversation, January 13, 2010).

The opportunity to step out of her role in the CRMU also presented a chance to finally advance her interest in building community engagement since the Fortress was expressing interest in strengthening relations with the community. Fougère comments that her temporary assignment with the Culinary Project has provided her with the time and the influence to initiate the development of a Louisbourg-based version of UVic's *Building Community Relations* course. "With this position that I'm in now...I can take the concepts used in the community partnership course...relate those concepts together and come up with concepts like the [proposed] course."

The following table, based on Eraut's (2004) stages of transfer highlights both Fougère's agency and the affordances provided in the workplace over time. In doing so, it illustrates the interdependent nature of these factors and the multiple points at which adverse conditions might have halted the process. While the course under discussion had not been offered at the time of the interview, much of the planning and all of the approvals were underway.[20]

Eraut's steps	**Fougère's Transfer Experience**
The extraction of potentially relevant knowledge from the context(s) of its acquisition and previous use.	Fougère found *Building Community Relations* a transformative learning experience. "I looked at [community] in a whole new light, and thought "ohhhhh, I can even engage a community." I thought all of that was fascinating...that really changed me. (p. 19). Fougère reflected on the content of *Building Community Relations* in the situated context of her site and her growing understanding of public programming. "The coursework had a lot of good examples... where communities have been on the brink of extinction, and how a revitalization [initiative] has...enhanced the community and healed.... I thought 'oh, that's good stuff' because these were cases that actually happened. It wasn't just a theoretical thing...it made me realize that 'okay, so we need to do a lot of healing as an organization and as a community. We need to begin that healing process to work together'" (p. 19).

[19] Freeman Tilden wrote the seminal book *Interpreting Our Heritage* in 1957.

[20] The course, which was to have been offered in June 2010, was cancelled due to low enrolment.

Understanding the new situation, a process that often depends on informal learning.	"…ever since I…took the *Public Programming* course, I thought 'wow this is so inspiring" (p. 6). However, Fougère recognized that she could not act on her interest. "I knew that [the Fortress] wasn't ready for that…. So I had learned about it and thought 'okay,' and…put it to the back of my mind.… Then as circumstances changed, you find yourself taking skills and using them.… So I never found it frustrating."(p. 20) "With this whole refocus on becoming more community-based that's coming out of Ottawa I'm able to sit and chat about those building blocks and principles with my colleagues and the approach on how to go about that. Like I said, you don't always use [the things you learn] right away…sometimes there are points in the future where you're able to incorporate what you've learned into your workplace" (p. 20). Through increasing interactions with management in her culinary project, Fougère found opportunities to recommend that the instructor of *Public Programming* visit as a consultant on community relations, thereby raising the profile of such initiatives. "I gave my opinion. [The Superintendent] said 'alright, you take care of it' so I wrote the terms of reference, I wrote the justification to bring [the instructor] here" (p. 29).
Recognizing what knowledge and skills are relevant.	Fougère's sense that the timing for a community project was right prompted her to consider options. "I started scratching my head, thinking 'okay" ….The concept is there. So you start looking at that and go 'alright, I need to take these concepts and see where I can go with them'" (p. 36). Fougère's understanding that community engagement involves interactive development of vision and skills prompted her to conceptualize a short version of the *Building Community Relations* course in which community, staff and students would reflect on their mutual interests. "When [the instructor] was here, I said to her 'I wish you could come and teach a course. We started to chat about the whole adventure through the summer.…Then we brought [other partners] in…and said "what do you think?" I spoke to the Superintendent and he was very supportive of the idea, as was the CRMU manager, because of the direction that PC wants to go—more toward community engagement and to be community-driven as opposed to tourism-driven, and wanting to work together with downtown. This is an exciting initiative" (p. 6). "…I had the confidence to go to say "this is what I'm thinking, I learned this in my community studies course at UVic." And I can point to the binder and say "this is what I've learned" and use those case studies…to say "this worked in other areas and in other cities and urban [settings]." So you can talk with a little bit of context and background from other perspectives of what happened.… Reading the materials and going through the exercises in that course helped me form a good [case]… (p. 36).
Transforming them to fit the new situation.	Fougère recognized that community relations are complex. "You can't just go down and say 'well, you know, we're here. Let's give each other a hug and move on'" (p. 19). She understood that her authority was limited. "…community development and working with the community, that's not something that we can just go out and do ourselves…because of policies and practices that Parks Canada has in place" (p. 35). She notes "as far as facilitating something with the local community on my own…that's done in conjunction with our Planner, with the approval of the Superintendent."

Integrating them with other knowledge and skills in order to think/act/communicate in the new situation (p. 212).	"I'm revisiting the materials and looking at the other case studies to see what happened and what they did. …I've had a lot of input from [partners] on that and we're where we want to go and what we want people to take away from the course that they can apply in their own communities" (p. 33). Fougère notes her understanding of concepts became stronger in the context of practice. "There were all kinds of things…I didn't know before. [This experience helped me] to understand what was trying to be conveyed in the course." While Fougère is following steps outlined in her course, it has been necessary to consider each within a local context. "…first of all [you need] a champion. So I said 'okay, we have a champion downtown….' Step 2 is to have your committee, to get that buzz going downtown, then creativity, then brainstorming, then infrastructure money, then accountability. You go through those steps….Those are the things I've learned in that course…. I haven't come across anything that I didn't learn." Fougère also recognized that she did not have the full set of skills needed to carry the project through. "…I could hire somebody to help facilitate…because having an understanding of something and participating doesn't necessarily make you an expert in facilitation. I'm not an expert in facilitation, but I can participate as part of the larger group" (p. 27). "…this is a pilot and we're just trying it for the first time. We don't know what the impacts are going to be until the course has come and gone. The preparations for it are taking up a lot of time. We're hoping it's going to be a very positive experience, not just for the community, but for the participants." (p. 33).

Table 7. Fougère's Transfer Experience

While the formal learning about the purpose and facilitation of community projects took place during a CRM course, the less formal stages of finding an opportunity to apply principles, conceptualizing a situation-specific initiative, gaining approvals and resources, negotiating stakeholder involvement, anticipating and arranging logistical details, and contributing to content, involved considerable additional learning over an extended period to put these concepts to work.

Reflections

Fougère's experiences in transferring learning from CRM coursework to her workplace are plentiful and constructive. For the most part, the Fortress and her own working group provide a positive, benign but not proactive environment for transfer. Her most straightforward experiences are within the CRMU where the relatively procedural and isolated nature of collections management allows for the direct 'near' transfer of relevant concepts. While Fougère has had notable success in applying knowledge beyond the scope of this position, much of her 'far' transfer must be attributed to her strong disposition for learning and transfer, her ability to perceive affordances and adapt learning to meet the situated needs at FoL, and her

motivation to ensure that learning that is personally engaging and professionally appropriate is used in the workplace.

Her accounts of transfer show evidence of the deep integration of her learning with her personal commitment to effective practice. "All [courses] had an impact on how you look at how things work. And so you're always examining the situation that you find yourself in. …yes, it's a transformational change, and you may not realize it right away" (p. 20). In her view, new learning "…creeps into everyday life…little things. Doesn't it though? …It seems to be always there in the back of your mind, and you find yourself thinking about it. …Some things are more glaring than others, but you realize that it's there" (p. 21).

Musée Heritage Museum

Ann Ramsden, who serves as director of the Musée Heritage Museum (MHM) and affiliated historic sites in the small city of St. Albert north of Edmonton, does not see a problem in transferring learning from the classroom to her workplace. In her view, whether knowledge is applied immediately, over time, or not at all, the learning experience satisfies her curiosity and contributes to her understanding of her professional world. "I'm not just thinking in the short term…there's always an eye on the future because we just don't know how things are going to change" (Ramsden, Personal Interview, November 23-25, 2009, p. 39). Early in our conversation she laughed as she said "I am a lifelong lover of learning" (p. 8). I have often thought that this view is intimately connected with her positive experiences of transfer in her work.

The Musée Heritage Museum is the smallest of the museums that I visited. However, since it is nested within the Arts and Heritage Foundation (AHF) which, in turn is funded by the City of St. Albert, it fits within Broad's (2005) typology of institutional complexity as a complex organization. While multiple stakeholders and competing interests are managed at the governance and funding levels, the relatively small size of this organization appears to facilitate collegial relationships and straightforward communications, and the chain of command is visible and accessible. Since the Museum[21] itself is a small and tightly knit working group within this larger complex, it serves as the unit of analysis for this case. Seven continuing professional and administrative staff work closely and have a holistic sense of the museum's commitment to

[21] While the Musée Heritage Museum is a component of the Heritage Unit of the Arts and Heritage Foundation and its staff are involved in managing a range of affiliated sites, the acronym MHM is used throughout this study as staff tend to refer to the Museum in describing the work of the Heritage Unit.

community service and to one another's roles and responsibilities. Of this group, I interviewed Ramsden and colleagues including the Curator, the manager of public programming (Program Manager), the public programmer (Programmer), the lead Aboriginal programmer (Aboriginal Programmer) and the executive director of the Arts and Heritage Foundation (ED).

Organizational climate for transfer

A notable characteristic of MHM from a transfer perspective is its bounded, stable and largely independent organizational position within a larger civic framework. Resources include a small museum facility in the City Hall building, along with diverse heritage properties that preserve aspects of the City's rural and social heritage. Annual funding from the City, supplemented with admissions, retail revenues and project grants, provides reliable but tight operating resources. Both the prominent position of the museum in the City Hall and the stable funding reflect St. Albert's commitment to the MHM as a means of inspiring "a broader understanding of St. Albert and its diverse heritage" (AHF, 2009b). The AHF provides management services including fund-raising; budget management; legal compliance; long-term planning; marketing; community liaison; and general human resource management. By relieving the museum of these responsibilities, the AHF enables MHM staff to focus on specialized museum and heritage tasks.

General goals and management expectations for MHM are articulated in a Stewardship Agreement with the City that calls for the delivery of services "in the most effective, efficient and economical manner to meet the needs of the residents of St. Albert" (City of St. Albert, 2007). However, the specialized work of the museum is not closely supervised by the AHF or the City since neither parent agency has the expertise to closely monitor its day-to-day work. The Stewardship Agreement states that the museum will be managed in accordance with standards and best practices articulated by the Alberta Museums Association (AMA) (City of St. Albert, 2007, p. 3), and the ED of the AHF emphasizes that the museum "[is] mature, well developed, it's being led by strong people who are well educated in their field, and I tend not to tinker with it" (Personal Interview, November 24, 2009). This arrangement situates authority and accountability for the ongoing development and application of professional knowledge and skills within the museum. As Ramsden notes, "how we do [our work] is very much left to our own experience and abilities" (p. 3). She observes that there are no formal performance measures imposed by the City, and compliance with external guidelines is "left to the professionals on an

honour system… There's no formal way [for the AHF] to appraise that" (p. 3). The MHM is recognized by AMA's Affirmation Program as adhering to operating standards that comply with accepted definitions of 'museum' and codes of ethics and guidelines for practice (AMA, 2008; ICOM, 2006). The reliance on externally articulated standards creates a receptive environment for transfer of professionally endorsed concepts and practices. The ED of the AHF comments that while the City and Foundation help shape goals and animate ideas for MHM, "they are rooted and anchored in the principles that [Ramsden] brings to her work" (p. 5). This is also acknowledged by Ramsden. "We're the ones with the knowledge...we know what standards should be. It really is very much our job to make sure that the museum is being run according to best practices" (p. 3). As long as transfer activity is aligned with museum and stewardship work and does not involve external resources, staff have autonomy to implement new practices.

More specific and time-sensitive organizational goals linked with City and AHF initiatives are articulated in the AHF draft strategic plan and City of St. Albert planning documents (AHF, 2009a; City of St. Albert, 2009a, 2009b). However, staff observe that while these provide direction to MHM work, actually moving forward is subject to changing priorities and resources.

> We don't know if some of those initiatives are even going to begin, based on funding and grants that…have disappeared or at least shrunk…. We can have strategic goals here at the museum or at heritage sites, but if the Board thinks we should add this or this, it does change the timeline for our plans here. There aren't that many of us, and we have to re-evaluate and adapt and suggest alternatives, or at least different timelines.... It's the same all over the museum world. If you don't get an additional person or an expert... how are you going to accomplish…a great idea? (Program Manager, Personal Interview, November 25, 2009, p. 5)

While the organizational context of the MHM positions it to be largely self-directed and reliant on externally articulated standards of practice, small staff and tight resources restrict capacity to implement major changes in practice even when there is a recognition that new facilities and increased community roles would be of benefit. The external pressures that influence organizational development include a desire for a larger museum space to support the City's interest in civic and tourism development, and a desire to be better connected with diverse communities including First Nations. These changes are planned and represent positive change over time. The stable nature of the MHM and its parent organizations shelter the museum from large-scale financial or attendance issues which might require significant efforts to realign practices through new learning. Sessa and London's (2006) model that compares organizational readiness with pressures for change in the environment suggests that since

external pressures for change are fairly low, the likelihood of change within the MHM is contingent on the staff and their personal readiness and persistence in learning and applying new practices.

In this environment, Ramsden, as Director, takes a lead role in planning, budgeting, and annual performance planning for the MHM within the context of strategic goals, policies and priorities set by the AHF, and through consultation with staff and community advisors. Given her authority and autonomy in the day-to-day management of the MHM within a generally supportive AHF organizational environment, Ramsden plays an influential role in shaping the organizational climate for learning and transfer for her colleagues and for her own transfer efforts. Drawing on her commitment to professionalism, continuous learning and collegiality, and using planning and communication strategies gained from *Human Resource Management* coursework, she has put policies in place that encourage best practices and professional development. As the Program Manager notes, Ramsden "is really strong on education. She encourages it, gives you the time if you need that extra week to go and do a program. That's not your vacation time, that's work, and you bring [your knowledge] back to the museum" (p. 5).

Staff are required to belong to the Alberta Museums Association, both for collegial networks and because membership affords access to funding for learning activities. The MHM budget includes additional funding for professional development, and staff are not limited to budgeted amounts if they make a compelling case for participation that benefits their work. A one-page AHF policy highlights "the need for training and development for all employees to enhance current skills and to provide the highest standard of services to the community," and describes procedures for the reimbursement of expenses incurred through learning activities (AHF, p. 21). There is a tacit understanding that professional development will take place on work time. The recent introduction of annual performance plans includes reflection on learning needs. As the Programmer notes, "I've never worked...anywhere that has been so accepting and willing to develop its employees, not just to let them better themselves. I think they see the big picture: ...people get better at their jobs, and that makes a better work environment, and that makes a better institution" (Personal Interview, November 24, 2009, p. 8).

While planning for learning does take place for Ramsden's staff, it cannot be characterized as strategic. Organizational plans do not identify gaps in current or projected skill needs, and although learning plans are articulated, they are not integrated with strategic plans or systematically implemented in an environment in which pressures of work, shifting priorities

and a lack of directly applicable learning opportunities can result in deferred learning goals. As the Curator notes, learning goals are addressed "to a certain extent. We don't necessarily do all of them, and often a learning opportunity will come up that we didn't anticipate. There's a two day digitization workshop that came up last year that I went to. So oftentimes its more that something presents itself" (Personal Interview, November 24, 2009, p. 3).

Position design and scope play a role in transfer climate as well. While staff hold traditional titles and responsibilities, this small museum requires its staff to be knowledgeable across multiple functional areas in order to support one another's work and to collaborate in staging events and activities. "The only way a small museum like this is going to work is to weave ourselves together [so that] we learn about each other" (Program Manager, p. 9). The Curator notes that "it's so important for everyone to…understand what the other guys are doing. Here we actually need to step in and do it from time to time. ...I think it gives everyone more scope in moving forward in their professional development" (p. 8).

Staff indicate that they appreciate the permeable boundaries of day-to-day work. The Curator comments that "I enjoy being part of the process from start to finish. In the bigger institutions I was the one person making the mounts—you never got to break out of your slot. I much prefer the variety and scope [at MHM]" (p. 1). Ramsden also values breadth and diversity in her position, saying that "...it's everything from soup to nuts. Some days you are talking to city councillors trying to lobby for funding, other days you are dealing with things that the Board wants, and then other days you are changing the light bulb" (p. 2). On one hand, cross-functional responsibilities, along with the small size of MHM, facilitate appreciation of the value of new practices. On the other hand, transfer activity requires that all involved in a particular area be on side, particularly if space or resources are impacted. As the Curator notes:

> Here we do have a lot of autonomy, but we have autonomy as a group as opposed to [as] individuals.... Anything I do impacts the people around me. We have intellectual autonomy but we don't have physical autonomy. I can't say and do something wild in the gallery if [programmers] don't have space to do their programs. (p. 8)

The diversity inherent in MHM work suggests that staff are challenged to learn in a range of domains. The need to constantly develop content knowledge associated with collections and historic themes was cited by both curatorial and programming staff with greater frequency than the need to further develop knowledge and skills for museological practice. For example, the Programmer describes a conference that broadened his understanding of the

whiskey trade and brought into question interpretive approaches being used in the museum (p. 8). The Curator is particularly focussed on knowledge linked with collections and interpretive themes and notes that "we would like to be doing more solid academic work" (p. 9).

Summary

Using Fuller and Unwin's (2004) expansive–restrictive continuum of organizational climate for workforce development, the MHM can be seen as a moderately expansive learning environment. Its strengths lie in a strong team approach to both work and learning that results from its small size and positive collegial relations. Staff are reliant on one another to accomplish MHM goals and they recognize the value of cross-functional knowledge as a means of supporting one another. These conditions encourage positive attitudes toward development. On the other hand, the absence of explicit strategic planning for learning limits both vision and practical supports at the Museum and Foundation levels, thereby restricting workforce development and the systematic transfer of learning.

Nevertheless, both the efforts of the AHF to provide policy and funding that support CPE, and the supports created by Ramsden for staff development, result in a benign and receptive environment for transfer. Professional knowledge is perceived as valuable in any format, and learning for its own sake is as justifiable as learning for specific and immediate purposes: "…there's an acknowledgement that we have to be trained… Without that how do you ever bring new ideas back in? ...I think that if you don't do that, it would be very easy to stagnate" (Ramsden, p. 6). Professional development is also perceived as a morale booster. The ED of the AHF, for example, notes that "retention is a really big issue for us, so one of the great strategic aspects [of training] is people will want to stay and work for organizations that invest in them and care about them. It's not piecemeal, so much as customized" (p. 7).

In this context, individual initiative to identify, advocate for, acquire, and apply new knowledge appears to be the primary driver for learning and transfer processes. As Ramsden comments, "it's almost a 100% driven by myself" (p. 7), and notes that "I don't have a formal learning plan." She adds that while she never encountered resistance, "there was never active encouragement, it was always 'oh that's great—off you go' but no, there was never a push."

Personal agency for transfer

Distinguishing between organizational climate and personal agency factors at MHM is an imprecise task since Ramsden, as leader, is instrumental in creating and sustaining the climate in which her personal efforts to apply learning take place. Her disposition for continuous learning and for exemplary practice and her strong sense of professional and organizational affinity lend stability to the overall context in which processes of transfer occur in the MHM. She describes herself as a professional who strives to achieve established and emergent standards and stays current by "listening to people with new ideas, challenging ideas, reading journals, keeping up with disciplines" (p. 4). The impacts of her engagement in continuous learning are observed by her colleagues who note that "she brought very, very interesting theories and practices back [from her studies]. She puts us as a small museum on the cutting edge of museum practice" (Programmer, p. 7). The ED of the AHF reflects that "I think the core expertise and the principal-centred work that we do [in the MHM] lives very much with the Director of the Museum...She is kind of like the earth's core, the magnetic pull that keeps it all together" (p. 5).

Her enthusiasm for learning and making a difference through her work clearly contributes to her commitment to professional development for herself and her staff. She notes that "we are very lucky to work in an environment that is stimulating, that gives us a lot of autonomy, lets us grow, and gives us a lot of personal responsibility...it's a real privilege. I enjoy coming to work every day…" (p. 38). Her commitment to professionalism is grounded in both her education and experience. She holds a Master's degree in Human Ecology with a conservation science focus and has extensive experience in increasingly senior collections and management roles in different museums. As well, she plays an active role in several professional associations, including the Alberta Museums Association where she serves as a board member and workshop instructor. She devotes time to this because she wants to "give back as they've given so much to us, …[and to see] the directions that the museum sector is going" (p. 4).

Ramsden's strong professional identity seems to be a notable motivator for learning and is influential in her commitment to best practices. A strong sense that Ramsden is open to new approaches to her practice and therefore predisposed to transfer processes emerges. At the same time, adherence to normative best practice models that are ingrained through prior education, experience and commitment to professionalism creates dilemmas in the integration of emergent concepts that are not aligned with her background and philosophical stance.

> One of the things that may stop me wanting to [enhance public access] is my knowledge [as] a conservator. All the dreadful things that can happen [to the collection]—the lights could be on, [users] could be smoking. You've got that built into you, yet you're trying to find a way to make things more accessible. (p. 16)

Her sense of personal responsibility for developing knowledge and skills to enhance practice is evident in her decision to participate in CRM. She began the program in 2003, after completing her Master's degree and while working as manager of collections at MHM.

> I have this insatiable appetite to learn more and read more and understand more. When you learn on the job, you learn a huge amount, but sometimes you don't get the theory that you need. I found [CRM] fascinating—it was really interesting to find out why we do things a certain way…. And also it was an acknowledgement that my Master's degree had given me some very specific skills, but I needed to [get] more general skills. (p. 9)

She also notes that "I thoroughly enjoyed [CRM] because I enjoy learning, so that, to me, was a huge personal benefit. It was an accomplishment" (p. 10). As she anticipated both personal and professional benefits, Ramsden chose to fund participation through a mix of grant and personal funding rather than draw on the resources of the AHF. "It's something that I wanted to do so I took ownership and I wasn't going to let somebody say 'well it's not in the budget so you can't go.' …Also I had always been successful with writing grants so I was able to recoup a good portion of the costs" (p. 12). However, she did receive some leave with pay and general support for her participation in CRM based on trust in her understanding of her own professional needs and a commitment to her morale, as opposed to a strategic effort to build specific knowledge to fill gaps in organizational capacity. As the ED of the AHF notes, "whatever [Ramsden] sees next as her most logical development is where I think we should be investing, because developing her, keeping her happy, making [her] better is strategically going to lead to a better organization—and the retention of [Ramsden]" (p. 7) .

Ramsden comments that organizational support for the CRM program was largely benign. "Whenever I did ask [for support], there was never any question" (p. 11). As well, she indicates that her participation in learning activities such as the CRM program has not attracted a great deal of attention, prompted acknowledgement, or created performance expectations.

> ...what I don't understand is how you can really function in this sort of position without going out and getting information and bringing it back…. I just don't understand how I would be able to do my job without that. I do find it a little bit surprising that there's not more interest shown. There's platitudes certainly. "Well it's great to see you do professional development," but they don't really know what you did. (p. 13)

She adds that the general lack of recognition for her efforts to develop "can be slightly demoralizing."

Personal initiative is also evident in her accounts of efforts to apply her learning. While her position provides the autonomy to take action, her personal initiative is clearly instrumental in embarking on new, at times challenging projects. In completing Survey 2: Degree of Personal Initiative in Approaches to Work Learning and Transfer (Appendix C) during the site interviews, Ramsden indicates that she is the "sole initiator" in all the areas:

- defining the ways in which she approached her day-to-day work
- identifying emergent knowledge and skills associated with her specific job
- indentifying emergent knowledge and skills that enhance programs and services
- participating in professional development
- introducing new practices that impact her approach to her work
- introducing new practices that impact the work of others
- introducing new knowledge, skills and practices that impact organizational services, priorities and goals
- monitoring and evaluating the implementation of new knowledge and practice

These responses emphasize the degree to which Ramsden is self-directed in most aspects of her work, in learning, and in setting an agenda for MHM. She recognizes that autonomy and initiative are an inherent part of her role as a leader and that they carry responsibilities.

> Being visionary is part of being a leader. It has to be within the context and resources that you have. If you need more resources and you're visionary enough and you can articulate that, you'll get the money to go along with it. If you're just plain career-building, I don't agree with that. I've seen it in other institutions where people have gone in to make themselves look absolutely great at career building, and then they've walked away and the institution was in a worse position than it was before. They should be mutually compatible. (p. 35)

Elsewhere she notes that "...you've always got to guard against having a personal agenda and make sure that we are not using public money for something that's a personal agenda" (p. 34).

The maturity that Ramsden brings to her leadership role positions her as proficient, often expert, across the range of tasks involved in her role as Director, based on the Dreyfus and Dreyfus (2005) model of competence. Her knowledge and experience enable her to see most situations holistically rather than in terms of aspects, to adapt knowledge to the needs of the situation, and to think strategically about ways to negotiate the political and social relations of

the City, Foundation and workplace to achieve MHM goals. In the day-to-day management of the museum she exhibits expertise in that she appears to have a deep, intuitive and confident understanding of the complex and interdependent tasks involved in running the museum and serving its publics. Her holistic view comes, in part, from her commitment to continuous learning. Ramsden comments that her CRM participation "allowed me…to feel confident with [my] varied portfolio" (p. 10) and the Program Manager observes that the Program gave her:

> ... a more well-rounded idea of museums. She knows her stuff.... the program [helped] her in seeing management perspectives, but also seeing the other areas on an equal footing and how it's important that they don't stand alone, that they weave themselves together. (p. 9)

This degree of expertise seems important in enabling her to perceive affordances for the application of learning and to adapt it to meet the local needs. Ramsden also notes that she is still learning in such new areas as the management of heritage sites, or increasingly engaged roles with community. Her descriptions of such situations reinforce Eraut's (2004) contention that transfer is a process of learning to apply learning.

> I feel confident to bring new ideas into the workplace once I have thought them through and once I'm comfortable with the idea. I don't feel as confident if I'm trying to introduce an idea that I really haven't got to grips with myself, because I feel that leaves me…a little exposed. I like to be able to think the idea through and have quite a few of the answers already so that when you try to introduce it you've thought it out well, you've thought of the process, you've tried to guess some of the resistance that could happen…. So once I've worked all that through, then I'm happier to say okay, let's start moving forward. (p. 28)

Summary

Ramsden's strong sense of professional identity, her autonomy as both a Director and a professional, and her commitment to continuous learning, combined with her consistent initiative contribute to the considerable agency she exhibits in facilitating the transfer of learning from her CRM studies to MHM.

Transfer experiences

While Ramsden expresses confidence that almost all forms of learning from CPE are applied in some fashion, her reflections on specific instances of transfer, as well as those offered by her colleagues, indicate that a range of factors exert varied impacts, depending largely upon the nature of the content in question and its immediate relevance to practice. These tend to

align with spatial descriptors of transfer and reflect the levels of complexity and adaptation needed to make different kinds of learning meaningful in workplace settings.

Instances of near transfer, for example, are noted with reference to knowledge and skills acquired in short-term, focussed workshops. “I don’t view the workshops as being long-term investments...because [they address] a specific need” (p. 40). When Ramsden and others select and engage in workshops, the expectation is that the content will have direct relevance to practice. Setting workshop-related learning goals is not normally done through a formal process, but takes place in the context of staff meetings and less formal discussions that arise out of the collegial interactions that take place in a small and friendly workplace.

Participation in conferences, which is normally initiated in order to engage staff in professional discourses, to raise awareness of emergent issues, and/or to build professional networks—as opposed to satisfying specific learning goals—can also result in the acquisition of knowledge and skills that are of immediate value in the workplace. “We look at conferences as a whole and what they’re going to do, rather than being systematic, because there are normally things that will help address something” (Ramsden, p. 7). Such gatherings build awareness of issues and related knowledge that have relevance over the long-term as staff reflect on and adapt their practice. “I think sometimes you go to a conference and you deliberately seek out sessions which are a little bit on the edge because you want to get some idea of what it is [new].... Some of the leading edge stuff is just seed-planting” (Ramsden, p. 8).

The actual process of transferring knowledge from workshops or conferences is not guided by a formal protocol. In many cases, Ramsden or her colleagues debrief one another on the relevance of new practices, discuss their strategic value and implementation requirements, and make plans for integration. In other cases, the learner may implement new skills if they directly align with situated needs and practices. In still other cases, nothing happens since resources, systems, or priorities block the transfer process. An example of a relatively straightforward ‘near’ transfer process that Ramsden cites is the acquisition of digitization skills acquired in a workshop which she jointly attended with the Curator. These technical skills make an easy transition since procedures for use are the same in the classroom and the workplace. However, while the Curator and the Director addressed the same course content, their end uses were different. “It was absolutely invaluable because, whereas [the Curator] has to deal with the digitization of the collection, I have to deal with the writing of grants, and the management and allocation of our resource towards digitization” (Ramsden, p. 40). Clearly, just as the Curator’s

capacity to utilize digitization in her work is influential in Ramsden's inclination to transfer of this knowledge in a management context, so Ramsden's willingness to make use of this knowledge reinforced the Curator's efforts to put learning to work.

By contrast, Ramsden reflects that her self-initiated participation in the CRM program is a "longer-term investment" (p. 40). A key distinction between this program and short-term workshops is that the CRM curriculum is not as easily linked to the structure, climate, or needs of MHM, nor is course scheduling aligned with specific opportunities for transfer. The conceptual and generalized nature of CRM requires a degree of personal reflection and adaptation for transfer.

Some of Ramsden's experiences in transferring learning from CRM coursework do fall within the 'near' category. For example, she comments that a performance planning model described in *Human Resource Management in Cultural Organizations* was a good fit for MHM. She was able to put it in place with very little adaptation, and notes her perception of this affordance to implement performance planning came out of her studies. "I wouldn't have been exposed to that if I hadn't done that course" (Ramsden, p. 22). This course also prompted her to organize weekly staff meetings that have resulted in significant improvements in staff interactions. The *Curatorship* course explored ways in which conservation can be addressed within an integrated collections management plan. In the subsequent AMA Evaluation Report required of bursary recipients, Ramsden reports six months later that "this is an ongoing approach that I am taking…and this course is certainly helping to integrate the different functions within the museum to make the collections management better understood" (2005, p. 1). In these transfers, Ramsden relied on both her positional autonomy and initiative to introduce a set of pre-conceived procedures that were similar to the needs of her organization. While some minor adaptation was required to reflect MHM characteristics, on the whole these procedures were a relevant and timely fit.

Most of Ramsden's experiences of transfer however required a higher degree of adaptation and a longer-term transition period. The reasons varied from lack of immediate or appropriate affordances to a need for greater personal confidence in her ability to effect change. Nevertheless, the conviction that much professional development results in longer term benefits involving backward reaching transfer arose repeatedly in my interviews with Ramsden.

> One of the other things about the [CRM] courses was that sometimes you were taking a course that you may not be ready to take, or sometimes you were taking a course at a

> time that it wasn't a major strategic direction that you were planning... Sometimes the knowledge wasn't applied immediately.... There'd be a few things you could implement directly, tidy up a few things, implement a few procedures. But sometimes the bulk of it didn't get applied 'til later. But the advantage of taking a course in that way, where you save the knowledge, is it's still in your head, it affects the way you plan. (p. 26)

In some cases, the timing of the learning activity did not coincide with an immediate opportunity for application. "It really depends on what major projects we've got on the go at any particular time. Sometimes you can have ideas but can't put them into practice—maybe it's a year or eighteen months before you can get back to them" (Ramsden, p. 8). In other cases current work pressures and priorities mitigate against the immediate introduction of new practices and require a thoughtful and strategic approach to managing transfer processes.

> You can't put [new ideas] into practice right away because there's a fine line between...coming back all enthusiastic and telling everybody about something—they're always interested—and coming back with a hundred new ideas and saying "okay, we're going to do this." You see the look of horror on their faces. I've actually modified my enthusiasm...sometimes you have to file it away and bring it back gradually... There are different ways to change direction and I try to make staff feel more comfortable.... I try to not come back with wild ideas. (p. 8)

Elsewhere, Ramsden reflects that her capacity to adapt learning to fit the needs of the MHM is largely dependent on organizational readiness and culture, and observes that:

> You have to [ask] "is it going to fit with what we're doing? Is it going to be something that people feel comfortable with? Is it going to be something that they may not feel comfortable immediately, but there's...a long-term benefit, so we're going to introduce it and explain?"

While organizational and cultural obstacles to the immediate application of new practices call for caution, Ramsden also reflects that her capacity to strategically influence change has its pleasures. "I think that's one of the rewarding parts" (p. 8). She adds:

> ...some days you wonder why you're sitting here signing invoices and writing policy... the flip side of that, as the Director, is that you do get to put new things in place, you get to see new shifts, you get to position things so that you start to move in new directions.

In part, the pleasure Ramsden derives from implementing change is linked to her growing confidence in her leadership abilities. Ramsden's aptitude for introducing new practices in a timely and appropriate way is noted by the ED of the AHF.

> The challenge is to use your learning without it being obvious.... I think one of the great advantages of [the Director] is that she's a mature student, so she's not fresh-faced,

> fresh out of school.... She understands the value of what she has learned, and also understands that the implementation is as important as anything. You can go about this in so many different ways. I think the maturity of her thinking at this point in her career has a lot to do with how successful she can be. (p. 13)

Ramsden's longer-term or 'far' application of learning is also influenced, to a certain extent, by serendipity, particularly when decisions to engage in learning are based on either curiosity about emergent issues or CRM requirements that are not related to immediate needs. She indicates that she had little interest in heritage conservation at the start of her studies.

> When I first came to the AHF and when I started the CRM program, I had no interest in heritage—absolutely none. I was a museum person, I was objects-focussed. Now I look after all the heritage buildings. If I hadn't had to do courses I would never have had the beginnings of the transferrable skills to actually do anything with those. (p. 9)

Ramsden's new-found interest, a growing need for heritage site management knowledge, and increasing receptivity to a values-based framework for decision-making, prompted her to take additional heritage courses that have had notable impacts on her approach to site management.

While some learning is applied in a straightforward manner as opportunities arise over time, other learning needs time to gel. "Sometimes it's something that you have to put in the back of your mind...it's something you need to think about or watch to see how it's going to affect the museum" (Ramsden, p. 8). This might also involve considering how an idea might be adapted to the situated needs of MHM. "...you see case studies…[that are] very specific to their organization, so you take the essence of what it is and then see how you can apply that to your institution, because every institution is so very, very different" (Ramsden, p. 12). Concepts in particular are seen to require time to crystallize into useful knowledge. Ramsden observes that she takes a practical approach to thinking and work, saying "I'm the type of person who doesn't fully understand...things unless I can understand the context. I've always been a much more concrete than an abstract person" (p. 21). She favours theoretical frameworks that create meaningful linkages among ideas and contribute to her capacity for decision-making.

> One of the transformational things about CRM was that through the various courses I was able to find models that acted as frameworks. Once I have frameworks, then I'm able to fill in the pieces and bring things together.... I didn't realize that it takes some time—a few years—to understand what you've got and how useful it can be. Once I found information within CRM that gave me a framework, it was unconscious but suddenly that was something that I felt comfortable with. Now I have my framework, now I can focus and bring all the information in. And also change that framework with information that I brought into it... (p. 21)

One example of a framework that she has grown to value and adapt over time is a rubric that sets out criteria for determining the values-based significance of heritage resources.

Not every transfer experience was successful. For example, Ramsden comments that her efforts to coach a colleague to implement a collections planning strategy from a CRM course resulted in a product that was not useful due to a difference in the colleague's perceptions of themes for collections development (p. 27). While Ramsden would like to rewrite the policy, lack of time is preventing her from revisiting this task. Ramsden also acknowledges that some of the things she learned in the CRM program have no direct application to the workplace, but comments that these became a focus for reflection and, presumably, further learning.

> ...sometimes you hear somebody talking about things. It's really wonderful to hear, but you know that you can't do it. Then it's fun to analyze why you can't do something—are you the wrong size, the wrong type of community, is the staff the one that you need? Is it the Board? Or what? I'm always interested in things we can't do. (p. 12)

When considerable time elapses between learning and transfer, one of the challenges that Ramsden notes is change in understanding and recall of the content. In some cases details become elusive, but she indicates that she regularly references course materials. "I have the [course] binders at home and sometimes I cart them into the office.... The only thing is trying to keep them up to date... you have to remember that there will be new thinking" (p. 15).

Reflections

Considered in the context of the explanatory typology of transfer influences, evidence derived from this case study indicates that while an interdependent mix of workplace and individual factors are at play in Ramsden's largely positive transfer experiences, a benign but unstrategic learning climate places much of the onus for transfer on Ramsden's personal agency.

Within the Arts and Heritage Foundation, MHM employees are valued, a commitment to learning is expressed through policy and procedures, and there is an expectation that the MHM will utilize appropriate and effective professional practices. Organizational planning establishes short and long term working goals, but no supervisory interventions to specify performance expectations for Ramsden are identified. In this busy working environment, Ramsden's position as Director of MHM provides her with considerable autonomy and authority to undertake learning in response to self-identified organizational goals, evolving professional best practices, and personal interest. Positive collegial relations enhance the receptivity of the MHM climate to new approaches to work and modest resources are generally available to

support introduction of new practices. The overall organizational climate offers a benign environment that is not seen to present substantial obstacles to transfer. However, it does not offer a climate in which learning and learning transfer are seen as strategic imperatives that are strongly and systematically linked to personal and organizational performance.

On balance, much of the success that Ramsden describes in her transfer experiences seems attributable to her agency in putting learning to work. Her descriptions of learning experiences and the ways that she has taken initiative to strengthen and augment her practice, offer evidence that ability, capacity and motivation play influential roles in transfer processes.

Although Ramsden describes a range of transfer experiences, the application of knowledge gained through CPE and 'return on investment' are not issues that attract particular concern within this setting. Perhaps because CPE priorities are generally established by Ramsden and her colleagues rather than the organization, because formal learning events aren't specifically tailored to the needs of the institution, and because investment in professional education tends to be supported for its generalized benefits and morale-boosting effects as much as for specific performance outcomes, relatively little effort is reported in gauging the impacts of CPE on short or long-term performance or productivity. Instead there is a general sense that learning of any kind is likely to result in both personal and institutional benefits and that personal effort to apply relevant knowledge is an inherent part of professional practice. Ramsden expressed surprise at my comment that the literature of learning transfer suggests a low rate of transfer. "You never know when you're going to need [learned knowledge]. It's all connected. It's really a question of whether it's an immediate or a long-term need" (p. 39).

Gwaii Haanas

While Barbara Wilson (Kii'iljus) indicates that completing the Cultural Resource Management Program was a transformative learning experience in her personal and professional lives, she is less certain that she was able to apply much of what she learned. (Personal Interviews, February 24-26, 2010). On the surface, this seems inherently contradictory. However, focussed discussions reveal complex circumstances that influence her learning and transfer experiences.

Wilson has worked with Gwaii Haanas National Park Reserve and Haida Heritage Site for over twenty years, beginning soon after the formation of the Gwaii Haanas in 1989. Gwaii

Haanas is not a museum in the traditional sense of a building or site with a bounded collection. Instead, Gwaii Haanas may be categorized as an eco-museum[22] with an integrated focus on natural and cultural preservation, and a range of cultural heritage conservation and presentation tasks that are integral to its management. Wilson has always played a central role as a steward, curator, researcher and representative of Haida culture and interests within this Parks Canada office, although her actual position and responsibilities have evolved from public programming to cultural resource management (CRM). Her current position as the sole Cultural Liaison Specialist is within the Ecosystems group that also includes marine, terrestrial and monitoring ecologists. In addition to researching topics that relate to Haida life in Gwaii Haanas, Wilson continues to develop the capacity of the Haida Watchmen[23] to provide stewardship and interpretation at village sites throughout southern Haida Gwaii[24]. As a Haida elder, her work is grounded in a passionate and personal commitment to her heritage, along with enthusiasm for building understanding of her homeland, an appreciation for the work of Parks Canada, and a lifelong desire to learn and grow as a person. Just as she indicates that she has developed professionally within Parks Canada's systems, so she has played a role in aligning Parks Canada's approach to cultural heritage more closely to the values and perspectives of her people.

Gwaii Haanas is one of 47 National Parks within the Parks Canada system, and is subject to the corporate goals, policies, and procedures that regulate this far-flung network of special Canadian places. It is also unique within this system as a landscape and as a partnered enterprise with the Haida Nation. The protection of Gwaii Haanas as a National Park Reserve is an outcome of active Haida resistance in 1985 to environmental and cultural degradation caused by logging on Lyell Island which lies at the heart of the this archipelago of islands. The governments of Canada and British Columbia signed the South Moresby Memorandum of

---

[22] The concept of ecomuseum emerged from a growing focus on peoples' role in ecosystems in 1971 when Hugues de Varine and George Henri Rivière pioneered the establishment of place-based and community-run 'fragmented museums.' As Davis notes "the ecomuseum mission is to conserve the very special nature of places–a territory with its landscape, wildlife, historic artefacts, peoples, customs and folklore that is managed by local people–with emphasis on special touchstones that are valued and exhibited to local people and visitors" (Davis 2005). This is not a term that is formally used at Gwaii Haanas, but it provides a useful framework for understanding its work.

[23] The Haida Watchmen are an arms-length group that has provided on-site stewardship and information to visitors to the protected area that now comprise Gwaii Haanas since 1981.

[24] Haida Gwaii, the home of the Haida People for millennia, refers to the cluster of islands off the north-west coast of British Columbia that were renamed the Queen Charlotte Islands by European settlers. This traditional name has recently been reinstated as the formal geographic name for these islands.

Understanding in 1987, and the National Park Reserve was established in 1988. The Government of Canada worked with the Council of the Haida Nation to negotiate the Gwaii Haanas Agreement that set out terms for co-management in 1993. While the two parties disagree on ownership of lands within Gwaii Haanas, they "maintain viewpoints regarding the Archipelago that converge with respect to objectives concerning the care, protection, and enjoyment of the Archipelago…" (1993, p. 1).

The Haida once numbered 20,000. They were decimated by smallpox in the mid 19th Century, leaving 600 survivors (Kii'iljus, 2009). Today the Haida Nation has approximately 2500 citizens on Haida Gwaii, most of whom live in either Skidegate or Masset. Another 2000 live elsewhere (CHN, 2009). They are internationally known for their traditional and contemporary monumental and fine arts in such media as wood, argillite, gold and silver, and for their cultural integrity and political solidarity. However, the significant loss of their cultural heritage, starting with devastating diseases from the time of European contact, and continuing with oppressive policies and attitudes over the past century and a half, creates lingering stress in this community. Wilson notes in an article in *Haida Laas* (Kii'iljus, 2009), that even though current generations "weren't physically part of the epidemics, we still suffer the consequences, and the ingrained sadness that a lot of people suffer from can lead to depression, alcohol abuse and other things — people are looking to get their power back" (p. 8). Designation of Gwaii Haanas as a Haida Heritage Site was an important step in the process of redaiming power because it has protected an area that is integral to Haida cultural continuity. It is also significant because the process of protecting the site in collaboration with Parks Canada has highlighted the Haida Nation's position on land title and created a precedent for co-management of terrestrial and marine resources that is considered a model for many jurisdictions (Wheatley, 2006).

The Gwaii Haanas Agreement (1993) sets out ways in which Haida are involved in co-management. In addition to stating the two parties[25] will "share and co-operate in the planning, operation and management of the Archipelago," it establishes the Archipelago Management Board (AMB) comprised of representatives of each party, who work "in a spirit of full and frank disclosure" (p. 3). Among matters to be addressed by the AMB are "strategies to assist Haida individuals and organizations to take advantage of the full range of economic and employment opportunities associated with the planning, operation and management of the Archipelago" (p.

[25] the Government of Canada, as represented by the Parks Canada Agency, and the Council of the Haida Nation.

4). It is the parties' objective "that Haida individuals be encouraged and given opportunities for employment with the Canadian Parks Service in the Archipelago. To this end, the Government of Canada agrees…to provide training to assist Haida individuals to qualify for employment opportunities" (Appendix 4, Section 2). At this point in time, over 50% of the 44 Gwaii Haanas employees are Haida, including the Field Unit Superintendent, who notes that "I am Haida. I grew up in this community. When I sit down at the table to discuss issues, I respect and understand the local concerns" ("Profile: Ernie Gladstone", 2008).

Given the size of the site, this case focuses on Wilson's immediate working group within the larger system. In addition to talking with Wilson over a three day period, I also interviewed her colleagues in the Ecosystems Group including the Ecosystem Coordinator (Manager) who serves as her supervisor, the Ecosystem Data Specialist (Data Specialist), the Backcountry Coordinator (Coordinator), a colleague from the Communications area who serves as Heritage Presentation Specialist (Presentation Specialist), and the Park Superintendent (Superintendent).

Organizational climate for transfer

Gwaii Haanas, with its remote and distinctive terrestrial and marine environments that have supported Haida over millennia, invokes passion and commitment among the people who care for it. The strong view that cultural heritage cannot be understood separately from the land, the ocean, the place, is integral to the organizational culture and climate for transfer. This follows the Haida ontology as expressed by Guujaaw,[26] that "land is our culture" (as quoted by Presentation Specialist, Personal Interview, February 25, 2010, p. 8). Accordingly, both natural and cultural heritage work are grounded in the profound, integral, and reciprocal relations of people and place. This broad and inclusive perspective on the scope of conservation work is a defining feature of Gwaii Haanas and leads to a situated, integrative and adaptive view of the principles of eco-system research and management, including cultural resource management. Staff observe a "sort of universality that everything connects to everything else" (Presentation Specialist, p. 8). Specialists in terrestrial, marine and monitoring ecology and mapping and information management—and Wilson as the sole CRM specialist—express commitment to this view. The Ecosystems manager, for examples notes that although he has not had formal training in CRM, "I understand [CRM principles] as a sensible, seasoned professional person [with] thirty years experience. I understand how critically important it is, particularly in the context of Gwaii

[26] Guujaaw is currently the President of the Council of the Haida Nation.

Haanas" (p. 1). He also notes that with increasing emphases on ecosystem integrity and visitor experience, the CRM function at Gwaii Haanas is likely to require increased support over time.

Staff express a sense of privilege that they are involved in conserving, researching, and sharing special places. For example, Wilson describes her involvement as "phenomenal" (p. 2) and a colleague comments that her capacity to work in the islands "...is the icing on the cake. When you reconnect it makes you remember why you're doing paperwork" (Coordinator, p. 15).

The focus on integrative ecosystem conservation is evident in the AMB Management Plan (2003) which sets multi-year goals and objectives for all aspects of work. It describes Gwaii Haanas as "a serene and wild place where natural processes occur unimpeded and where humans accept that they are part of this natural order" (2003, p. 7). A new marine protected area is the culmination of years of work and extends the protection that this co-managed site affords to the islands and adjacent waters. This strong conservation ethic is also notable in the allocation of resources. Funding, while always perceived to be tight, is stable and seems motivated by conservation priorities as opposed to high visitation. With approximately 3500 visitors per year, Gwaii Haanas has a low attendance rate relative to many parks with a similar budget. Even as it is challenging for visitors to access Gwaii Haanas, there is also recognition that visitation must be limited to minimize impacts on natural and cultural features.

While commitment to an integrative approach to cultural and heritage management is a defining feature of this organization, another theme that I perceive from my interviews is the practical challenge inherent in balancing national conservation, visitor experience, and management policies and procedures with local approaches that honour the interests and values of the Haida (Data Specialist, p. 12; Wilson, p. 27). Because Gwaii Haanas is nested within the larger Parks Canada system, it can be considered as a highly complex system (Broad, 2005), in that it is a component of a much larger organization in which both direct and indirect chains of command and influence define local practice. Parks Canada directorates in Ottawa and specialized service centres in western Canada establish norms that guide most aspects of work on these remote islands. On one hand, the vision and resources of Parks Canada offer an invaluable framework for the preservation of Gwaii Haanas. "It's amazing. The people that run the place—not the politicians but the people that run Parks Canada—the people who come from 'away' and have really high values and ideals about how we should treat the world are so great, are so great" (Wilson, p. 3). On the other hand remotely articulated edicts are not always a good fit with the unique needs and values of the islands. As Wilson notes:

> Parks Canada is out there in Canada. You know, we get stuff that tells us what we should do here, but because we have the Gwaii Haanas Agreement, we live differently. ...we have our world here and the things and pronouncements that come down from Parks Canada a lot of time [prompt us to] roll our eyes and think "my God, what are they thinking about?" (p. 3)

As such disjuncture is experienced at governance, management, interpretation and staffing levels, formal measures that strive to ensure an equitable Haida voice are critical in guiding and supporting local management processes. The AMB—a unique governance model within the Parks Canada system—affords an equal voice in decision-making. "The reasons [Gwaii Haanas] works are because we have a lot of the same values as a people that Parks has, and those values are about protecting our land and the things that live on the land with us.... That's huge" (Wilson, p. 28). Over time and with adjustments (Wilson, p. 24; Manager, p. 12), this model has evolved into "an adaptive co-management system that is flexible, community-based, tailored to specific situations, and supported by a concerned government agency to ensure ongoing solutions to sustainable resource management" (Wheatley, 2006, p. 143). As the Ecosystems Manager notes, "the AMB runs the show and they've never had a decision they've had to kick upstairs" (p. 12). A particular strength of the AMB is the degree to which it honours and integrates traditional ecological knowledge within decision-making (Wheatley, 2006).

Respect for Haida perspectives and traditional practices shapes the climate for learning transfer, in that standardized 'western' approaches to cultural stewardship tasks are adapted to align with Haida cultural values and with unique characteristics of Haida heritage. Wilson states that from a First Nations perspective, "you can't just talk about buildings in a little box. You can't just talk about plants and forget that people used them. Or the ocean...I think we have to have it more holistically" (p. 33). At the same time, Haida approaches to stewardship are shifted in the co-management process. For example, Wilson must balance the ways in which monumental wooden structures are conserved using contemporary conservation techniques with guidelines from hereditary leaders. While largely positive about the capacity of the AMB to provide responsive and equitable governance, Wheatley (2006) reflects that "Aboriginal peoples have had to develop bureaucracies that parallel those of the federal government with which they must deal and compel Aboriginal people to speak and act in ways that tend to be very different from those of their original culture" (p. 147). Cultural conservation in this setting is a complex task that is informed by sophisticated geological and biological research that builds understanding of Gwaii Haanas *as* a place, integrated with archaeological investigation, oral

histories and archival research that builds understanding of Haida life *in* this place. Wilson, working with archaeologists, ethnobotanists, and other CRM specialists, holds a deep understanding of the natural environment that is integral to her knowledge of Haida cultural practices, place names, traditional use areas, village sites, iconic poles, and relations with the land. Her epistemological stance, her work, and that of her colleagues, are grounded in the stories of the Haida.

> The knowledge of the X̲aayda (Haida) and other indigenous peoples has long been dismissed as myths and legends by colonial authorities. In recent years, however, some western scientists have begun to recognize the correlations between the oral histories and the archaeological and geological evidence…. Archaeologists working in X̲aayda Gwaay yaay (Haida Gwaii)...have made extensive use of our stories in locating and interpreting historic and prehistoric sites... (Kii'iljus & Harris, 2006, p. 121)

Wilson goes on to note that ancient Haida stories (k̲'aaygang.nga) "captured through electronic or written records of our ancient past are valuable as a record of our occupation.... For western scholars interested in the ancient past, k̲'aaygang.nga can provide information that cannot be easily obtained, or that can be completely missed by methods of archaeology or geology" (p. 121). Capacity to re-interpret traditional knowledge through contemporary research further enhances insight on Haida life. As Wilson, referring to her work with Parks Canada archaeologists, notes:

> I think the greatest part of [my work] was all that Haida history that I'd been denied growing up was all of a sudden shifting around and becoming visible. These guys were doing research and they were talking about all these things, and I'm going "wow!" (p. 2)

While Gwaii Haanas is part of the Parks Canada family and subject to its policies, procedures, supports and expectations for learning, its location off the north-west coast of British Columbia, and its cooperative management structure shapes the learning transfer climate in situated ways. Concerns about staff morale throughout the Parks Canada system prompted a review of human resource management, learning and supervisory strategies in the early part of this decade (Parks Canada, 2004). As part of this review, Wilson was invited to an off-island session that explored morale. "We talked about...discrimination, isolation, all those things that happen" (p. 26). One of the outcomes of system-wide consultation was the Parks Canada *Learning Strategy* (2005) that, among other things, calls for a better supervisory and recruitment skills, a learning plan for continuing employees, and the development of core and specialized competencies. It takes considerable time however to effect change in an

organization of 38,000 employees. Gwaii Haanas interview participants were not generally aware of the provisions of the *Learning Strategy*, although they are seeing some new initiatives in supervisory training and in performance planning at the local level. Wilson reflects that:

> I think that it's the nature of the beast. Parks Canada…has so many things that are good—and [for] the values of how we treat the land and how we look after things, you couldn't find a better place, it's amazing—but they forget that it takes people to do the jobs and people need to be supported. (p. 26)

For the most part, training associated with management practices is coordinated through the Vancouver Service Centre, while training associated with CRM tends to be coordinated more remotely in the Calgary Service Centre or through the Historic Sites Directorate in Ottawa. All staff are expected to participate in training that builds knowledge of policy and of a range of management and technical procedures. Depending upon the degree of specialization, some training is conducted for staff in-house while other training involves travel to workshops and courses conducted elsewhere in the system. Although there is no shortage of training for staff, its perceived relevance at Gwaii Haanas varies. The Superintendent comments that:

> ...we try to put a lot of effort into that. We haven't measured how effective we are, but over the last three years I guess, we've really made an effort to ensure that every single employee in the organization has both a performance evaluation and a learning plan. We've started to review those quarterly with employees. …[it takes] quite a bit of effort, especially in the first couple of times you get together. The learning plan is intended to address any issues that come out of the performance evaluation. You look at any performance related issues as well as discussions around where people see themselves going in five or ten years. (p. 1)

The efficacy of planning for performance and learning in Wilson's Ecosystem Section appears to be somewhat dependent on the value that both the supervisor and employee perceive in the process. The Ecosystem Manager, for example, expresses frustration with the process. "Quarterlies are a waste of time. The annual [review] is important. When I first came here they didn't even do that... [Now] you do a performance evaluation and there's supposed to be a training plan" (p. 6). In his view, planning for training is not particularly meaningful. "I've got PhD level people. They don't need too much training. What they need to do is get their work and stuff done. But if they want to do some training, I'm happy" (p. 7). When asked about the value of CPE to build on expertise gained through PhD studies, he notes, "I think you have to be sensible about training. If it's well focussed…that's fine" (p. 7). He also notes that resources limit

training. When staff propose courses, he reflects "…I'll say yes, but if the budget allows for only one trip per year, then that's their trip. It's up to them to prioritize. They're adults" (p. 8).

Wilson observes that while a performance and learning planning system is in place, it does not tend to result in specific actions. "We have quarterly reviews and every 3 or 4 months [my manager] comes along and says 'okay, write up something.' So we write down what we've been doing, email it to him [and he says] 'okay, sign it please'" (p. 10). She adds, "once a year, we have to put forth a training wish list, but it doesn't mean anything [because]...nothing happens." She comments that she has asked for training in a variety of areas in recent years, including writing and management, but has not received support. She attributes this to a lack of resources but also speculates that it may also be due to her proximity to retirement (p. 15).

Gwaii Haanas devotes approximately $70,000 annually to training for its 44 employees (Superintendent, p. 2). This exceeds Parks Canada's rule of thumb of $500 per employee per year and accommodates costs involved in off-Island travel or in bringing trainers to Gwaii Haanas. While the planning for learning highlights individual needs, the organization must give priority to mandatory training. As the Superintendent notes:

> We actually have a rating process for how we approve training. So the first priority is any legal requirements for peoples' positions, and the next priority is again related to peoples' positions, but not legal requirements. And then the third is more what people are putting forward on their own as developmental opportunities that may or may not be related to their position. It has to be tied in somehow. (p. 2)

He observes that "Parks Canada has put a lot of effort into new policies around this training plan stuff. They've put a lot of effort into developing mandatory in-house type training for supervisors… Most of our funding has been going towards getting people into those programs" (p. 2). The focus on management topics is observed by the Presentation Specialist. "There's lots of professional development that happens, but it's more to do with administrative, supervisory, management, [or] leadership, rather than within my own area of interest" (p. 3). The utility, if not the excitement, of such courses is noted by the Data Specialist: "there's the very dry corporate messaging type of stuff.... It's a PowerPoint that's read off of, and often the type is too small to read...that's dry, but I guess it's necessary, and you pick up things from that" (p. 6).

When asked if expenditures for training result in a meaningful return on investment, the Superintendent comments that:

> I would say that we don't do a very good job of that.... I'm not even sure how...I'd have to put a lot of thought about just developing a tool to evaluate that. It's something that

> I'd be interested in doing. And I think with the trend with the way government is going around accountability [it's important]. Now we're hearing rumours about cutbacks. We're really going to really have to start paying attention to return on investment stuff, so if there were some tools out there [I'd be interested]. (p. 3)

While some pre-training goal setting and post-training debriefing have been used at Gwaii Haanas, systematic efforts to maximize the benefits of training are not consistently implemented, particularly in terms of sharing new knowledge and considering its strategic benefits. The application process does enquire about ways in which learning is expected to strengthen practice. "I generally put in a written statement of why I'm going and how it will benefit the work" (Data Specialist, p. 4). The Presentation Specialist comments that in the past consistent debriefing occurred. "A few supervisors back...we would write up a bit of a report afterwards, talking about what we got out of it and what we wanted to share from it—I usually like to try [to do this] if I'm sort of bubbly and enthusiastic about something" (p. 6). However, she notes that this kind of debriefing rarely happens now. When the Data Specialist returns from a professional development activity, he normally initiates a conversation with his supervisor regarding the items that he feels are of interest for his work and his colleagues (p. 4). His supervisor, the Ecosystem Manager is receptive to debriefing, but doesn't require it of his staff.

> If they want to brief me, then I'm happy…. If [an employee] tells me [that a learning activity] was good...I say "great, good, fine." What more do I need to do? ....These are professionals. I don't need to hold their hand. What I need to do is, if they have a problem, help them. I need to discuss with them what they need to do, support them, and then they get on with it. (p. 7)

The Superintendent's observation of room for improvement in evaluating training is echoed in more direct terms by the Manager who expresses concern about the degree to which training benefits employees. He observes that Parks Canada has "an [excess] of mandatory training" and states that he considers it time-consuming and largely irrelevant (p. 4). At the same time, he attributes the current emphasis on training to a desire to build capacity for the significant changes that are impacting Parks Canada. "I admit our own organization is going through incredible change, and it's very difficult to manage that change. Part of change management is ensuring that your staff are trained, inculcated with the big ideas" (p. 5).

Another factor that impacts the overall climate for transfer at Gwaii Haanas is the degree to which staff, particularly non-Haida staff, move within the Parks Canada system. As a local resident, Wilson, is by far the longest serving professional employee. The Backcountry Coordinator reflects that:

> Parks Canada promotes moving...it's good from a professional development perspective because you get exposed to so many different places, people, challenges…. But for the site itself, it slows down your efficiency, especially as every site in Parks Canada is different… You know how the system works generally, as far as filling out applications for funding or something like that. But there are unique aspects of each site that have to be learned, and sensitivities that have to be learned by each person before they can really be productive. (p. 11)

She also notes that there are "huge changes whenever you have a changeover in staff…you have constant flux and flow of personalities...and the personalities have such a tremendous influence on how the organization works or doesn't work" (p. 10). Such an environment seems to call for constant negotiation, advocacy and adaptation to introduce new practices.

Yet another characteristic that appears to be influential in transfer is the largely autonomous and isolated nature of individual positions. As noted, the Ecosystems group is comprised of specialists who bring expertise to collaborative conservation and management decision-making. As a group, they are well-educated and their roles are largely defined by professional norms and expectations that have been articulated by Parks Canada. Some belong to external professional associations and all express a passion for the work they do. However, while they draw on further expertise from the Parks Canada service centres, each specialist is the sole expert on site. As such, each exercises considerable positional autonomy in defining day-to-day work within the broader context of the Management Plan and the Ecosystem unit's annual objectives and work plans. For example, Wilson indicates that while the Ecosystems group meets once a month to "talk about issues" (p. 14), she receives "very little direction as far as I can understand. The [manager] says to me 'you're a professional.' [That's the] end of discussion" (p. 9). She elaborates that "unless I go to his office, I don't see him on a professional basis during the day. Once in a while he'll send me an email if he's looking for something, because he knows if it's something to do with Haida I'll know where to find it" (p. 12). While the situated nature of CRM practice within this context sets the stage for considerable adaptation of practices and calls for innovation, the onus rests with the individual to animate this process.

Summary

The climate for transfer at Gwaii Haanas offers a complex mix of supports and obstacles for transfer processes. A passion for both the place and the work creates a strong organizational commitment to effective professional practice, while clearly articulated goals set out in a management plans establish short and long-term work priorities. In this setting, learning that

enhances capacity to achieve goals is generally welcomed and integrated. However, the integrative cultural and natural context in which work take place calls for considerable adaptation of generalized learning to meet situated needs. While the AMB provides management and educational systems to encourage such adaptation, explicit strategies and supports for transfer have not been implemented.

Considered in light of Fuller and Unwin's (2011) continuum of expansive to restrictive environments for learning, Gwaii Haanas can be characterized as largely neutral, in that it has not strongly embraced most of the organizational characteristics of an expansive environment[27], but does not create significant obstacles for learning that is personally initiated. The particular strengths of the Ecosystems group include some stable positions that allow for growth and transition into expert roles and considerable access to training relating to corporate priorities and procedures. Its limitations include the degree to which professionals are disengaged from communities of similar practice while also isolating them from cross-functional development and communication. Another limitation suggested by the Fuller and Unwin continuum is low supervisory engagement in performance planning and development.

Personal agency for transfer

Just as the transfer climate is characterized by its integrative balance of Haida and Parks Canada cultures, so Wilson's agency for learning and transfer is similarly influenced at the personal level. "I'm the head woman of my Clan, which is [equivalent to] the Chief of the Cumshewa clan…. So...what I do within the village as a Haida woman plays a significant role in everything I do" (p. 9). This, of course, includes her work. She indicates that she is proud to work with Parks Canada but that "my affiliation feels like it's with Gwaii Haanas. Parks Canada is out there in Canada" (p. 3). At the same time, Wilson does not strongly identify with other CRM staff or think of herself a professional in either the museum or heritage worlds. Her professional purpose in working with Parks Canada is clearly to be a steward of Haida heritage and to build understanding of her people.

> I think of myself as a conservator because what I'm doing [is] conserving things so that other people can know about them...because I have lived a lot of things, and our younger people haven't or people from away haven't. I would like to try and take my experience and write about [it] in more global ways so that people understand more about who we are as a people.

[27] See Chapter 6 for further analysis

Wilson recognizes that her knowledge of her people has expanded in meaningful ways as a result of Parks Canada's focus on research. "We had little smatterings of knowledge about ourselves, but we didn't know a whole lot" (p. 2). The opportunity to work alongside archaeologists, ethnobotanists and ecosystems specialists has been very positive. "I loved it, I just loved it. It was fun. I learned so much, you know, it was just amazing. …it would teach me stuff about myself, about my Nation" (p. 2). She observes that this learning has enabled her to connect and integrate both scientific and traditional knowledge.

> I think that [over] the last twenty years I have been learning and my brain is just like a big sponge. My Dad has told me things, and things kind of fall into place. I've been told something by somebody as some point, and a lot of times I don't even remember what it was they told me, but when I see something, I recognize it and I go "wow." So when I look at being here and the kinds of things that it has given me, it's phenomenal. (p. 3)

Wilson's knowledge of Haida heritage allows her to contribute unique perspectives. "I can find little things that other people will read and it doesn't mean anything to them. But...because of somewhere inside of me I understand what it meant" (p. 3). Her knowledge and commitment to sharing provide a perspective that is clearly valued. The Data Specialist credits Wilson's "dedication and vision" (p. 11) with much of the success of a Haida place names mapping project, while the Presentation Specialist emphasizes that she has played a key role in communicating the heritage of her people. "It's one of the most powerful things she does for this organization."

Wilson acknowledges that the experience of learning about her heritage that is afforded by her work with Parks Canada has developed her own self-awareness. "It's like watching TV and dozing: you know something is going on, but you're not really aware of what it is" (p. 3). She adds "But I feel like I woke up…the combination of working here, living here, learning here, and then stuff that I learn in other places, comes together and I go 'wow'."

As one of the few Haida workers in the early years at Gwaii Haanas, Wilson describes herself as forceful in expressing her perspectives. This stance created difficulties in workplace relations to the point that she felt alienated from some colleagues. "So I thought 'okay, I'm going to do something about it.' I went and dealt with a lot of my issues…. A lot of people talk to me about the changes they've seen in me and most of them are good" (p. 8). Some of these changes relate to personal issues that she has resolved through counselling. "Healing workshops that I've gone to, that kind of stuff that I've paid for myself. I make a point of listing them on my evaluation and I put 'self-funded' so they know I'm doing things for myself" (p. 15).

Other personal changes that Wilson has initiated relate to her involvement in the CRM program. She notes that while the AMB cooperative management agreement includes a provision for training Haida staff, the onus rested with her to advocate for a learning program and negotiate supports (p. 10). Her determination sustained her through a personally challenging process of applying for and engaging in formal studies. She indicates that her uncertainty was linked to residential school experiences that prompted her to quit high school. "The counsellor [told] me 'oh no, you won't be going to University' and then I thought 'what am I in school for? Why bother?'" Over twenty years later, when she recognized that she would benefit by further learning and would have Parks Canada support, she completed high school requirements and applied to the CRM program since it was aligned with her work and its intensive and distance courses made it accessible. While she did not hold an undergraduate degree, the Program admitted her provisionally on the basis of her life and work experience.

> When you accepted me into the Program on a trial basis it was the first time it had ever ever been acknowledged that I was intelligent…. I had no self-esteem about what my intelligence level was. I [felt] I wasn't worthy, I wasn't smart. And I think that I felt that a lot of people thought it was my face that got me the job. It was really hard on me. I thought, you know, I do have a brain. There was a part of me that knew I was smart, but it had never been acknowledged by anybody else. (p. 8)

Wilson comments that there were times that she struggled with CRM content as she did not have the academic foundation that most students bring to their studies. "I think that if I had to do it all over again, I can see the value of having courses in environmental sciences prior to going to CRM because they would give you the grounding that you need" (pp. 35-36). She goes on to say that due to lack of knowledge about the larger ecosystems context, she found some of her studies "disconnected. I don't think I can still make those connections. Probably emotionally I can, because it has really served me well as an individual. Did I do justice to [the Program]? I really don't know." Nevertheless, participation in CRM was instrumental in building self esteem.

> I felt at the time and I still feel that it was very valuable for me, if for no other reason than to say "I accomplished it, as an individual, as a Haida person, having grown up in a time when we weren't allowed to go to University."… To go from "why bother?" to knowing that I had a brain that was brilliant and that I could do things with it if I chose– and if you've never been there, you could never know–that [was a] huge, huge step between that fifteen year old girl and that woman who went to University. (p. 20)

She also emphasizes that her involvement in the program provided a framework for thinking and confidence in her ability to learn and to perceive opportunities to use her learning. She

loved going to UVic to take courses "because I was learning lots here [at Gwaii Haanas] but the courses gave me context. They gave me a structure. They showed me that I could find things, that I could do things, and I graduated! That was the highlight of my life at that point" (p. 8). Wilson's comment that the courses gave her context is repeated in her observation that:

> ...because I had never gone to University before and [CRM at Gwaii Haanas] was a new field I was involved with...I think that I looked for validation with the stuff I was doing on the ground. For me that was really good. (p. 17)

Wilson's involvement in the CRM program was entirely self-directed. She chose her electives without any input from her supervisor "I looked at what I was doing on the ground, and tried to make the courses be relevant" (p. 18). She adds "things like museum design and principles of [artefact] conservation and those things in the museum stuff, I didn't pay much attention to because I didn't see that they would be something I could use in this job." While she favoured courses relating to cultural resource stewardship, she did not have specific learning goals that directed her acquisition of knowledge—and in looking back, she finds it difficult to distinguish between what she already knew and what she acquired in the classroom.

> There was stuff I learned, and I can't say "that was it" because I think that I was feeling so 'hole-ly' that stuff was going through me like this. When a hole got plugged with knowledge, it was hard for me to say "did I have that knowledge already, or did I get all of it from 'here', or how did it work?" (p. 20)

In keeping with the light supervisory approach taken in the Ecosystems group, Wilson exercises considerable autonomy in planning day-to-day work and in her use of learning. "You look at what you've got to get through, and there are different things that you want to do.... You have to decide for yourself where you're going to fit them in" (p. 14). Since Wilson works in isolation from other CRM specialists however, she reflects that "I'm a group of one. Who do I talk to? In this office, I'm the only 'cultural' person, per se, with that title...I'm very isolated" (p. 19). She also comments that she has not had the resources that she needs to always work effectively. "I need people to work with in this office. I've had no one to talk to.... If I had an idea I had to pick up the phone to call [my colleagues in Victoria [or] Calgary" (p. 33). She also notes that, as the only person working in the cultural management role during a period when such responsibilities were being devised across the system, her job has not always been well-defined. This is also observed by the Presentation Specialist who comments that "it's one of those positions where the expectations have been a little bit vague" (p. 14). Participation in CRM

strengthened Wilson's confidence in undertaking her somewhat isolated and undefined work and her credibility in applying both existing and new knowledge:

> She was definitely energized by the opportunity to go [to UVic] and she gained confidence that she did have the skills, even though they weren't previously formally recognized. Now she had the formal credentials to say that yes, she has the capacity to do that job and to be recognized as a professional. The perception by her supervisor and by her peers changed, because she made the commitment to go back to school. That in itself is a big thing, specially when you're not a spring chicken. (Coordinator, p. 13)

Summary

Wilson's agency for transfer is shaped by her integrative Haida world view and a strong commitment to better understanding and preservation of Haida cultural heritage. This, combined with her disposition for learning and her motivation to share her knowledge, makes her somewhat receptive to new approaches to practice which support her goals. At the same time, her work is grounded in her traditional cultural knowledge that is, at times, at odds with Parks Canada directives for cultural resource management. Learning in the context of the CRM program challenged her to reconcile yet another framework for practice with her situated needs and to identify opportunities for transfer in circumstances that are significantly different from generalized museum and heritage contexts discussed in class. This lack of similarity may account of Wilson's assertion that the primary outcome of her studies was to consolidate her existing knowledge within a professional framework, rather than to acquire new knowledge that did not seem relevant. Her agency for transfer is shaped by her capacity to recognize a fit between her world and that of the classroom, and between standardized content and frameworks for museum and heritage practice and situated approaches to conservation in Gwaii Haanas.

Transfer experiences

Wilson suggests that while she did acquire new and useful knowledge in the CRM program, there were times that content did not seem relevant to needs. As a result her interest or capacity to learn was inhibited.

> I got confirmation that I [already] knew something about what I'm supposed to be doing. That came from practical, on-the-ground stuff that I was learning. So what did I get out of the courses? It's hard to put into words because there were days when I felt like "did I learn anything?"…Other days when, depending on what the course was, it was really good. (p. 19)

She also notes that she is hard-pressed to relate her learning to specific instances of transfer as she cannot distinguish between what she already knew and what was gained in the classroom. Part of this is due to the passage of time, and perhaps to an accident that impacts her recall.

Probing for specific experiences of transfer with Wilson did reveal a number of instances in which she was able to put new knowledge to work. It also suggests that many of the benefits of educational participation are more generalized and harder to describe or measure. Among the examples of useful new skills and knowledge, Wilson indicates that the course *Planning for Cultural Organizations* provided her with tools that have been valuable in many aspects of her work. "One thing that sticks with me is being able to look at things if I have to, and look for strengths, weaknesses, threats, opportunities" (p. 17). She comments that strategic planning has been useful to her. "I think that I had a lot of the skills, but I didn't have them in a step-by-step form that I could use. So it gave me some skeletons to hang things on and make sense of what I was trying to do…So there was value, lots of value" (Wilson, p. 30). She notes that she passes these concepts on. "[Planning skills] served as a good tool for me. And I want young people to have that kind of strength because I know I didn't when I was a young person…" (17).

Wilson also recalls that CRM shifted her understanding of the role and purpose of museums. "[I] looked at museums as places for dead things. ...experiencing museums in Victoria and going to class with people who came from those institutions served to broaden my thoughts about museums and about what we wanted here…I enjoy museums a lot more than I used to."

Since Wilson's work focus is on cultural heritage *in situ*, she notes that she initially felt that some required CRM content was irrelevant. "...design and principles of conservation and those things in the museum stuff, I didn't pay much attention to because I didn't see that they would be something I could use in this job. The fact that they were core [requirements] was really hard" (p. 18). However, as she has become the steward of the Gwaii Haanas collection and served as a board member with the Haida Museum at Kay Llnagaay Heritage Centre during planning for the new facility, she has engaged in backward-reaching transfer. As a result, some of the learning that she had to undertake has proved to be valuable over the long term.

> Probably the [course] that I got the most out of…is the one where we looked at items that are held in museums, because I had a bunch of [artefacts] come back here [from the Calgary Service Centre]. Learning how to handle them and learning about the kinds of things that were used to preserve them was very important for me since I didn't have a sense of what went into…keeping things from rotting and that sort of thing. That was really important. (p. 28)

She goes on to note that learning that she gained relating to collections is largely procedural. Her comment illustrates the difficulties inherent in measuring learning and transfer activity.

> It has been valuable. It has taken on a level in my head that it almost becomes automatic. I have learned it and it is there. When I need it, it comes forward and I use it. I don't think "oh yeah, this is what I learned at University." It's just a part of who I am now. (p. 18)

She reflects that her learning has become so integrated with other forms of knowing that it is challenging to separate out specific aspects of learning gained through studies. "There's a lot of things that I don't say 'this is archaeology, and this is cultural tourism...' I use everything at an unconscious level. It's just part of me, and it's just part of how I do things" (p. 29).

A course that Wilson recalls as relevant was *Managing Archaeological Resources*. One of its benefits was building her confidence in overseeing the conservation of village sites.

> ...it sounds very inconsequential, but up until ten years ago, we had no dandelions on SGang Gwaay World Heritage Site. So we're frantically every year digging up dandelion roots and burning them. And thinking about introduced species and attempting to keep that place fairly original in its flora, and everything that's growing around there. The things I learned at University certainly have [made me] fairly comfortable with the things that I have to do. (p. 29)

She goes on to describe how she has adapted learning from her coursework to meet the situated, culturally defined needs of conservation on site.

> Because I have directions from the Hereditary Leaders of Haida Gwaii that we're not to use any kind of insecticides, preservatives, or anything for *in situ* articles [I am] looking at my options and trying to be respectful of what's on the ground, being respectful of the hereditary leaders' wishes, and yet still trying to do a job to preserve a place. [It's] huge, you know, huge thinking about "okay, what's acceptable?" (p. 29)

Another influential course was *Cultural Landscapes*, although Wilson laughs when she describes the degree to which its principles required adaptation to the particular needs of Gwaii Haanas. "You know I can still see pictures of cultural landscapes that they showed me when I was at the course… looking at England's rolling green landscapes" (p. 29). Although this course reinforced the importance of working with indigenous plants in landscape restoration projects, Wilson experienced frustrations in applying these principles at the Haida Heritage Centre. She relates a sequence of events that ultimately led to the use of plants imported from Vancouver since the Skidegate Band Council's contractor did not—or was unable to—honour the advisors' preferences due to lack of knowledge. Since the gardens of the Heritage Centre were to be used

for ethnobotanical studies, the presence of non-Island species detracts from the authenticity and utility of the grounds and introduces plants whose chemical make-up does not align with traditional Haida uses (p. 35).

While some courses offered useful learning experiences, Wilson reflects that their content is not always appealing to study or apply. She comments that while she hated the *Financial Management* course, she did come to appreciate that her math skills were better than expected. "I never ever knew because I was so afraid of math when I was in high school that I just shut down" (p. 17). While this course gave her skills that have value in her personal life, she tends not to draw on them at work as she has little budget responsibility. Wilson also notes that some content was contrary to her value system. For example, she comments that the western conservation ethic of saving objects in perpetuity creates a dilemma.

> I think "that's not really for me." If it was my world out there and I was responsible for training and changing policy, I think what I would have done, rather than saving the object… [is] put the object back into the community. And I would make the master carver the object of preservation. I would make those skills the thing that we pass on and talk about. I would make those Masters' knowledge the precious things. (p. 30)

An unexpectedly beneficial learning experience was an English composition course that is required of all University of Victoria students. While this is not a CRM course, and was challenging to access until it was introduced in a distance education format toward the end of her program, Wilson comments that it was of immense value because "English is my second language even though I speak it. My thinking process, I feel is deeper than just what my brain knows. And even though I'm a published author, I struggle with English" (Wilson, noting her published works, Kii'iljus, 2009; Kii'iljus & Harris, 2006; Kii'iljus et al., 2007).

> I wish I had taken it at the beginning because…my professor…was wonderful. She helped me through English. She would sit and talk to me about things on the phone. …it helped me overcome my fear of the language and I think that it gave me some tools so that if I had taken it at the beginning, it would have been much more comfortable for me to write [my assignments]. Much more comfortable for me to understand a lot of things…It was amazing, I was really glad that I took it. (p. 21)

Because Wilson completed the Program in 1999, she indicates that both the passage of time and a recent accident have impacted her recall and limit her capacity to describe specific transfer.

> The interesting thing for me, in looking back on it…I can't remember all of it…I think that what I did was I looked to validate knowledge I had already. …Yes, I learned lots. Could I tell you what I learned that has been most beneficial? I can't. I can't put one thing down and say "this was the best." (p. 17)

When asked if any of the concepts discussed were transformational, Wilson replied "no" (p. 17). She does refer back to resource materials from time to time. However, Wilson is enthusiastic in describing more generalized and personal benefits of the program that also impact her work and interactions with colleagues. She emphasizes that CRM contributed to her confidence and sense of maturity. "It was a combination of me going to school, looking for direction, trying to put my life straight, and all that. I think that it helped me grow up" (p. 23).

> It shifted things for me. You know, over those years in between 1980 and 1996, I had started going to counselling and trying to sort out my life. This was kind of the cream, this was kind of the icing, to prove to myself that I could do things, that I didn't have to avoid...because my whole life was about not being responsible. It still comes through. It's one of the hardest things I've been able to overcome, [the notion that] "I can't do it, I'll just ignore it, it will go away"...even when I knew I could. I always knew I was brilliant, but I was so afraid of being proven wrong, that I proved it wrong. (pp. 23-24)

She goes on to reflect that her learning has supported her development in both professional and personal spheres.

> I think that I've gone from being a little girl who was frightened of everything and that took very little steps...because I felt I had nothing to offer. And now, I sort of go "wow." You know, I'm 67 and I'm not afraid to say, for the most part, what I think. Most things I try to say kindly because I feel that that it is a real gift to know how to say things so that people accept them and can get through what the mouthful is about. ....I think that the time that I was at UVic...has been very very influential because prior to that I had graduated from nothing. (p. 32)

Part of Wilson's challenge in applying learning has been the need to both perceive affordances and adapt various types of content to opportunities over time.

> Timing is everything. I think that I [use learning] over time because I see [how it can be applied]... Even if it wasn't the content of whatever I was learning, the peripheral things were [valuable] because I think that I'm a learner who observes. Observation is very important, and hearing. If I have to read, ycccch. It takes me forever to get through stuff. It's very difficult. And yet I learned lots, I know I did. And I know that it was of value. (p. 20)

Wilson's increased capacity for research is observed by the Data Specialist who comments "I would say that after she finished your program, the Place Name mapping project really took off. There's no question. There was still a lot of learn-as-you-go, but it really did take off...she was able to research much better" (p. 10). He also observes that Wilson acquired skills and confidence in other areas, noting that her writing and organizational skills improved. He describes a project that Wilson initiated to travel with Haida elders throughout the Archipelago.

"I don't know if she would have been able to do that before. [She was] also better connected with professionals in the [CRM] area... [She was] definitely more confident in doing that type of work" (p. 10). He emphasizes that much of what Wilson has accomplished in her work with Gwaii Haanas is grounded in her vision and dedication.

> She gets things done. When she sees something on the horizon, she sticks with it, although there may be a lot of turns.... Place Names is a good example. We have stuck with it...it's not easy ...that's quite a process and it does take dedication and it takes vision. And she has that.

Reflections

Wilson's experiences of transfer in Gwaii Haanas highlight how both her ontological stance and the particular cultural and professional practices of a unique workplace influence how generalized knowledge is construed in the classroom and selectively adapted for local use. This case offers valuable insight to the ways in which cultural perspectives shape the transfer of learning that is framed in normative professional and organizational ways. At the same time, while Wilson comments that she did not find it easy or productive to transfer such conceptual or procedural content, this case illustrates that many of the strategic skills gained through studies play important roles in building her capacity for effective practice.

Chapter 5 A Comparative Case Analysis

While the literature of learning transfer laments generally low transfer rates, three of the four cases in this study provide evidence of high perceived transfer, while one makes visible the challenges inherent in adapting generalized and westernized knowledge to Aboriginal ways of knowing and stewardship. Across all cases, multiple instances of both straightforward 'near' transfer when circumstances of learning and use are similar are described, along with more complex long-term 'far' transfer when content is dissimilar or not of immediate relevance. Along the resulting continuum of near-to far-transfer in case settings, there is also considerable evidence that the degree of additional learning required to adapt, negotiate and integrate new knowledge becomes increasingly complex as the need to adjust to local circumstances grows.

These cases also reveal instances in which the absence of a fit with local needs means that transfer does not occur, although respondents note that their understanding of professional practice is enhanced even if learning has not been put to work. In each setting, graduates indicate that learning from CRM is of value, and three of the four express confidence that much of it will be of use at some point in time. For example, Johnson at HDM emphasizes that she draws on her learning because "it's definitely always there" (p. 30), while Fougère at FoL comments "one way or another it gets applied. It may not get applied right away, but at some point in time, you use [the] skills in the workplace" (p. 11). Ramsden at MHM makes a similar observation, saying that her learning is all connected. And despite her uncertainty about the relevance of her learning to practice, Wilson at GH indicates her learning is integrated within her cumulative knowledge base, and it is evident from descriptions of growing confidence that the strategic skills she gained have enhanced her insight and proficiency in practice.

While Chapter 4 focussed on learners, their contexts and transfer experiences, this chapter takes a particular look at the two research questions, *how do conditions in the workplace shape the transfer process?,* and *how does personal agency influence museum professionals' inclination to put new learning to work?* In doing so, it explores ways in which workplace and agency factors appear to impact transfer; similarities and differences in transfer dynamics across cases and how these might be explained; and the degree to which transfer dynamics across the cases align with the guiding framework and may be generalizable to theory. This comparison also discusses ways in which these museums offer distinctive transfer climates.

Thematic Analysis

In Chapter 2, "*Figure 2*: Four Categories of Learning Transfer Factors", offers a starting point for organizing and discussing a range of content, instructional, agency and workplace climate themes that I derived from the literature, along with related constructs and propositions. The specific themes that relate to agency and workplace climate provide an explanatory framework for predicting influential transfer factors and for designing data collection and analytic strategies. Through an iterative process of examining the data in the context of these themes, and examining the themes in the context of the data, a number of factors and associated dynamics emerge throughout this study as notably influential in learning transfer in these museum settings. These are set out in *Figure 3*: Influential Factors in Learning Transfer in Museums. Despite my openness to themes that are not anticipated in the literature, my analysis did not reveal many unpredicted dynamics so much as it highlighted that a number of factors appear to play particularly influential and nuanced roles in these museum settings. This chapter discusses the ways in which the four cases bring meaning to this model.

Museum Climates for Transfer

Because workplace climate creates the context in which learners make use of learning, factors that contribute to climate for transfer are addressed first. Data from Chapter 4 that describes learners experiences, as well as new data specifically associated with the question, *how do conditions in the workplace shape the transfer process?* are used in this cross-case comparison. This sets the stage for recognizing interdependencies among museum conditions and the agency exercised by museum workers.

Organizational factors

The overall characteristics of the organization establish the climate in which work plays out. This section explores the ways in which the following factors influence the likelihood of transfer:

- Nature and culture
- Supports for learning and employee development
- Pressures for change

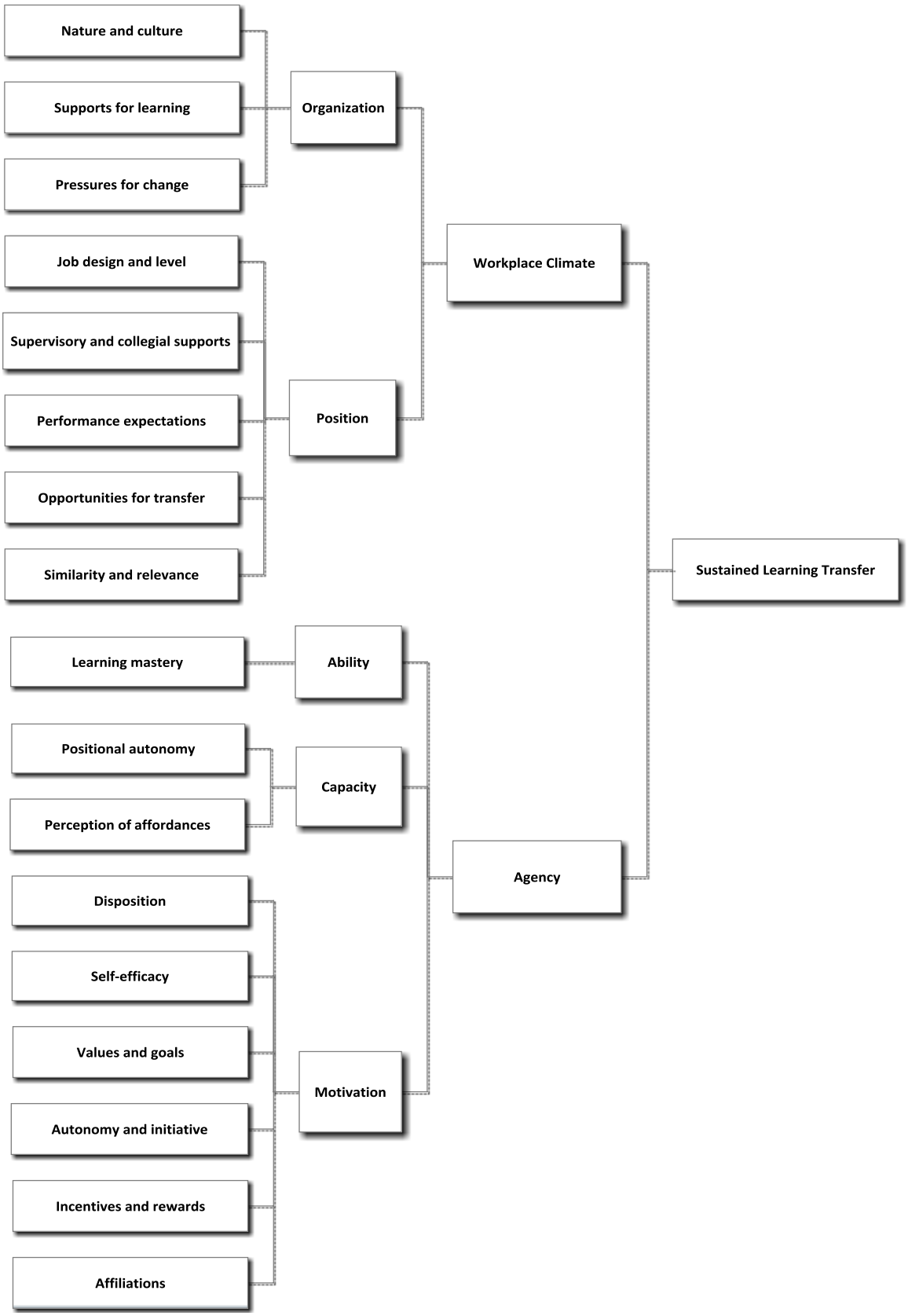


Figure 3: Influential Factors in Learning Transfer in Museums

Nature and culture of these case settings

While the four museum case settings vary in terms of size, mission, cultural heritage focus, and resources, all are organized around an 'intention-bound' (Sessa & London, 2006) commitment to stewardship and public service that shapes organizational culture and establishes the specialized professional nature of organizational tasks and goals. These, in turn, determine museum-specific work design and priorities, along with contexts for learning. This stewardship purpose sets these museums apart from more corporate workplaces with bottom-line commitments to productivity and profit that are the normal focus of transfer theorizing, and it aligns with Macdonald's observation that "museums, whatever family resemblances they have to other institutions or practices, are...a peculiar kind of mix, drawn from a partially shared repertoire of ambitions, histories, structures, dilemmas and practices" (2006, p. 7). In each case setting, mission is described by participants as an inspirational guide that establishes a conservation ethic and a commitment to service, creates a framework for their specialized roles, and sets high expectations for creative professional practice. "We're fairly 'in sync' here in terms of what we're trying to do...we know what our mandate and our mission are and what it is we're trying to achieve" (MHM, Curator, 5).

Participants express a sense of privilege in working in these stewardship-oriented organizations along with an affiliation with their collections, educative purposes, and capacity to make positive contributions in communities. In Haida Gwaii, Wilson affirms that her work is "inspiring", while Fougère at FoL comments, "…I love working with the collection. I love how the objects tell little stories…I love talking to the people about the collection. I love interacting with visitors. I like the planning. I like the people I work with…" (p. 11). Pleasure with her work is also noted by Ramsden at MHM. "We are very lucky to work in an environment that is stimulating, that gives us a lot of autonomy, lets us grow, and gives us a lot of personal responsibility. I think it's a real privilege" (p. 38). She adds "I'm not in a corporate world having to sell my soul…"

Devotion to a service-oriented purpose is consistent with an altruistic sense of public duty and a commitment to creative and social work that is observed in the museum field more generally (E. B. Bailey, 2006b; Kavanagh, 1994; Weil, 1988) and sets the stage for a pronounced ideological orientation to effective and innovative professional practice. Both organizational and collegial recognition that educated staff are essential in the achievement of mission is noted in each case setting, although the degree to which this commitment translates to policy and practice varies. At the corporate level, Parks Canada emphasizes that "building a culture that

supports continuous learning and improvement is the most important competency for any organization. This is our long term vision and requires the support and involvement of every individual in Parks Canada" (2005, p. 1). At MHM, the ED of the Arts Foundation observes that support for learning builds expertise as well as trust, loyalty and strong morale (p. 8). And a HDM, the VP observes the importance of professional skills and their role in effective practice.

An integral part of the organizational nature and culture in these museum settings is the professionalized nature of work, defined remotely from the organization itself. Specific attention to somewhat autonomous professional practice, as opposed to more highly directed vocational work, is not widely developed in the transfer literature, beyond the work of Eraut (1994, 2004), Daley (2000, 2001, 2002), Clarke (2002), Yelon et al (2004) and Webster-Wright (2009). In each case setting, curatorial, educational, exhibition and management roles are grounded in normative principles and guidelines that characterize professional practice across the museum sector. Both HDM and MHM are accredited by museum associations, while FoL and GH are held to standards centrally established by Parks Canada. These externally articulated performance expectations help regulate both the ideological environment and culture. While day-to-day practice is variably shaped by local resources, priorities, cultural and political dynamics, and social relations, there is a pervasive sense across all four museums that it is important to adhere to broadly accepted but remotely defined museological and conservation standards to legitimize local activity.

The situated nature and unique culture of each case setting however shapes perspectives on the local skills and knowledge needed to maintain competency. It is notable that local adherence to remotely articulated professional standards—or rules (Rainbird et al., 2004b)—of practice plays out in varied ways that impact staffs' capacity to apply learning and, in some cases, creates a degree of tension. For example, at MHM, staff are hired for their expertise in specialist museum roles and encouraged to maintain affiliations with a nearby museum association because it provides ongoing guidance, resources and networks to support and legitimize their somewhat isolated work. This explicit link to the broader museum community creates considerable organizational awareness of and receptivity to established as well as emergent best practices. Although this museum's municipal governing body has little specialist museum knowledge, it trusts the director and staff to introduce appropriate practices. As MHM is small, channels of communication are straightforward and staff indicate that they are interdependent in their work. A collegial atmosphere encourages discussion of new practices,

and transfer processes are negotiated in terms of impacts on the group, perceived fit with professional norms, workload, available resources, and fit with museum and City priorities.

At HDM, staff are more distanced from involvement in external professional communities, in part because the majority do not bring specific museum training to their work, and in part because resources are not available to support professional engagement in museum associations. "That's kind of on the lower part of the radar right now" (Johnson, p. 4). While jobs are defined in terms of standard museum functions and there is a strong organizational commitment to innovation and quality, awareness of codified best practices and commitment to staff development is less pronounced than at MHM. "...administration relies on the connections that [a few of us] have because we've been in the museum world" (HDM, VP, 11). In this busy museum, there is a receptive environment for best practices and a range of collegial and supervisory supports, but not a proactive or systematic organizational commitment to their acquisition, assessment or maintenance. In both MHM and HDM, the perceived appropriateness of new practices among colleagues is influenced by their external professional legitimacy in the museum community. For example, Ramsden emphasizes that getting external information is critical to her practice (p. 13) while Johnson turns to professional organizations when she wants detailed guidance on a range of procedures. This aligns with Clarke's (2002) observation that:

> In relation to professionals, it may well be that the strength of professional associations and relationships within organizations mean that peer support mechanisms may be of far greater impact in determining transfer of training than the emphasis that has been laid on supervisory support. (p. 157)

The other two case settings at Louisbourg and Gwaii Haanas, while very different at local levels, are both nested within Parks Canada and draw on centrally-established and codified museological and management policies and procedures designed to guide work in field locations. The commitment to professionalism that is evident at both sites seems defined by organizationally-articulated standards of practice rather than by those set by external professional associations. Staff are directed to work within these guidelines, and receive and transfer considerable procedural training. However, they engage in few external professional networks that contextualize their specialized work within a broader and more theoretically grounded framework. As one employee noted, it was not until his CRM participation that he appreciated that his carefully regulated collections management practice was aligned with standards set by professional associations (FoL, Curator). In Gwaii Haanas adherence to

professional norms is further complicated by the commitment to align practice with traditional approaches to stewardship used by Haida partners. For example, Wilson observes that "we get stuff that tells us what we should do here, but because we have the Gwaii Haanas Agreement, we live differently" (p. 3). In these settings, when knowledge is acquired outside organizationally-sanctioned training programs, it must be aligned with both corporate and situated values and procedures to be useful. The variation in the ways in which generalized conceptual, procedural and strategic knowledges from CRM are made meaningful at the local level in case settings highlights the critical role of learning to apply learning noted by Eraut (1994, 2004).

The size and complexity of each of the four museums also shape organizational culture and influence climate for transfer in distinctive ways. Broad (2005) notes that small organizations tend to have moderately complex operational systems in which communication is straightforward and the chain of command is visible and accessible. Observers in the museum field also note that what small museums may lack in scope or resources, they make up for in capacity for nimble responses to change (Davis et al., 2004; Falk & Sheppard, 2006). This is evident at MHM where all staff interact daily and explore strategies for organizational and personal development in a collegial manner. Bailey's observation that small museum environments "can engender high feelings of responsibility and obligation toward one's co-workers and the institution, as well as motivate people to accomplish needed tasks" (2006, p. 183) is borne out at MHM in the Program Manager's remark that "the only way a small museum like this is going to work is to weave ourselves together [so] that we learn about each other" (p. 9). The close interaction of staff, under the Director's leadership, shapes the culture and receptivity for new practices of this small museum in ways not observed in the larger museums.

Organizations that are large and multifaceted or that are a component of a larger system are seen to be highly complex (Broad, 2005, p. 232). Such organizations tend to encompass multiple areas of specialized practice that may have considerable internal autonomy. However, complex and often remotely controlled social and power relations involved in goal-setting, decision-making and communication may inhibit introduction of new practices. In the mid-size HDM, for example, a hierarchical chain of command is described as distancing workers' involvement in decision-making, thereby impacting staff capacity to introduce new ideas. In the FoL and GH case settings, local capacity to influence policies and procedures is also described as somewhat limited, particularly when opportunities for staff engagement in site

management are also restricted. Nevertheless, local climates shape the nature of these sites. At FoL, recently introduced inclusive management practices are creating a more receptive and innovative environment for learning and transfer. At Gwaii Haanas, the local context for decision-making involves a unique cooperative management agreement with the Council of the Haida Nation that supports the site-specific adaptation of system-wide Parks Canada policies and cultural management practices. Wilson comments that "everything is driven nationally. So what we do here [is] take whatever we're doing and we fit them into the new boxes. And we find a way to continue to do what we're doing, but under different labels" (p. 5). However, she also notes that adaptation of practices can be inhibited if union and professional norms are compromised. In every case setting, the size and complexity of the museum influences the proximity of decision-making and the capacity of the learner to advocate for new practices. As Fougère notes, "because we are bigger and it's a bureaucracy you can't just go out and do something that a smaller museum can do.... Sometimes it takes a little longer to get to the end result" (p. 11).

While the nature and culture of these cases vary according to their size and alignment with professional norms, it is evident that their common commitment to stewardship and public service, and their positive commitment to effective museological practice create benignly receptive environments for learning and for the use of content that contributes to missions. However Rainbird et al.'s (2004a) observation that workplaces are goal-oriented systems that are not normally focussed on learning seems pertinent: while learning to cope with growth and change is an inherent part of work, it is not the primary business of these busy museums.

Supports for learning and employee development in case settings

In such benignly receptive environments for transfer, the rules, policies and procedures that express an organization's values, attitudes and strategies for both personnel development and the application of learning are also instrumental in shaping the climate for transfer (Sessa & London, 2006). These can include strategic analyses of learning requirements, professional development policies, performance and learning planning, and preparatory and debriefing strategies (Zakreski, 2003). The presence of such formal provisions for development, along with the degree to which they are supported through the allocation of funding, time and strategic human resource development practices, all contribute to the likelihood that learning matches the needs of the organization and is therefore applied. "The value placed on training by the

organization conveys strong messages about how seriously employees view training, and whether knowledge transfer is enhanced or impeded" (Curry et al., 1994, p. 2).

While each of the case settings clearly identifies as a form of museum[28] and works to professional standards, the absence across the museum sector of individual accreditation, except among conservation professionals, means that policy and practices associated with the maintenance of professional expertise through continuing education are established at the organizational level, rather than by an external accrediting body. Even in MHM and HDM, which hold institutional accreditation from professional associations, specific professional development provisions are not required, although encouraged, as part of that status. Explicit organizational approaches to and supports for learning and staff development therefore emerge as variable factors in shaping the climate for transfer across the four museum. For example, three of the four case settings have both policies and funding that encourage learning, although none explicitly reference learning transfer.

In the smallest museum, the MHM, every professional staff member is encouraged by the Director, and more remotely by the parent organization through policy and funding, to attend conferences and academic programs. Both funding and paid leave are provided. In addition to addressing learning needs, CPE is perceived as a benefit that supports retention goals. As the Executive Director of the MHM's parent organization notes, "...one of the great strategic aspects [of professional development] is people will want to stay and work for organizations that invest in them and care about them" (p. 7). An MHM employee observes, "I've never worked...anywhere that has been so accepting and willing to develop its employees, not just to let them better themselves" (Programmer, 8). The ED recognizes that investing in the MHM Director's learning also ensures that this learning will be shared. "That's one of the very great strengths of someone like [Ramsden], because she has taken the time in her career to grow and develop, she fully appreciates what she should do. The transfer of that knowledge and that skill and that vision means the loop is closing" (ED, p. 8).

At the senior management level of Parks Canada, CPE is seen to be a strategic priority because "at the centre of change and learning are engaged staff, committed and passionate not only to their work and profession, but to the organization" (Parks Canada, 2005, p. 3). Pan-organizational emphasis on learning has recently been formalized through the creation of a

[28] As noted in the GH case description, this site can be defined as an eco-museum and is therefore within the CMA definition of 'museum', although it more typically describes itself as an historic site or a park.

Leadership and Learning Team within the Human Resources Directorate in Ottawa to implement the recommendations of a thoughtful *Learning Strategy* (2005). The *Strategy* describes CPE as a means of achieving a common, consistent and "dynamic learning environment for individual and organization excellence in achieving our mandate" (p. 1), although no reference is made to the systematic application of learning that results. While Parks Canada staff are hired to meet position requirements, considerable training is provided to ensure that they work within prescribed norms and standards. This organization-wide commitment to learning is further developed as a strategic means of accomplishing staffing equity at Gwaii Haanas. Among the matters to be addressed by its governing Archipelago Management Board are "strategies to assist Haida individuals and organizations to take advantage of the full range of economic and employment opportunities associated with the planning, operation and management of the Archipelago" ("Gwaii Haanas Agreement", 1993, p. 4). "It is the parties' objective that Haida individuals be encouraged and given opportunities for employment with the Canadian Parks Service in the Archipelago. To this end, the Government of Canada agrees…to provide training to assist Haida individuals to qualify for employment opportunities" (Appendix 4, Section 2).

Parks Canada's extensive network to provide system-wide management, policy, resources and procedural training, along with more specialized cultural resource management training, distinguishes the two Parks Canada sites from the other case settings—and from museums more generally. This is because the agency takes an instrumental organization-wide approach in systematically defining and developing specific kinds of both codified and tacit knowledge and skills, and in creating expectations of consistent practice. Funding for external coursework is also provided if the content is perceived to be relevant. At the local level in both sites, learning that relates directly to Parks Canada policies and procedures is organized either on site or in adjacent service centres. Some training is mandatory for all employees, while other activities are initiated according to more work-specific needs. There is an organizational commitment to learning at both the overarching and local levels that contributes to a receptive climate in both sites for the application of knowledge and skills that are aligned with established practices. In both settings however, while professional development policies and programs are articulated nationally, interviews indicate that implementation at the local level is uneven. In both sites, it is evident that measures to promote and support CPE that is not part of standard training are not seen as a key priority in the face of many other conflicting demands for time and resources. This is not seen as unusual in large and complex organizations. As Fuller et al. note,

"idealized visions of organizations and their capacity to support employees' learning may bear little relation to the quality of learning environments in many workplaces..." (2004, p. 300).

The mid-size High Desert Museum has not articulated a professional development policy or dedicated funding for CPE. "There's [no policy] that is delineated in a formal way...that I'm aware of, I think it's more loose than that, but I think it isn't for lack of desire. I do think the museum recognizes that that's important, but the reality is that it hasn't happened much" (Designer, 6). Staff are hired with specialized functional skills and develop additional knowledge on-the-job. While some funding for conferencing is provided to senior staff, the expectation is that staff will bear much of the cost personally and will participate on their own time. As Johnson notes, "...we don't have a formal professional development system here. It's just not really top of mind" (p. 31). That is not to say that staff do not engage in learning activities, just that they normally participate on their own initiative. "Fortunately there are a lot of really self-motivated people here" (VP, p. 5). When staff exercise initiative however, they do receive encouragement to also exercise agency in making use of their learning. For example, Johnson indicates that she was able use work time to complete work-related CRM assignments. "I never had to report my hours on the course. It was just "you do what you need to do, because we know this is going to help us in the end" (p. 18).

Each of the case settings expresses a commitment to annual performance planning that includes some attention to learning needs. However, despite good intentions, engagement in planning to strategically identify and support goal-oriented learning and transfer does not achieve its full potential. Performance planning, whether it is conducted using formal systems and instruments (FoL, GH, HDM) or through informal discussions with a supervisor (MHM, for the Director's position), is primarily focussed on setting goals for the job-at-hand. Associated planning to address learning needs that relate to organizational or personal goals is either unsystematic or unevenly implemented. Wilson at GH for example, observes that although some training needs are highlighted in performance plans, "it doesn't mean anything [because] ...nothing happens" (p. 10). This is echoed at FoL where, despite directives that every employee will have a performance and learning plan, "it is very manager-dependent" (Researcher, p. 10). If learning goals set out in such plans are not achieved, "I don't think there's a consequence ... It's just put forward to the next plan" (Researcher, p. 10), while at HDM the Curator comments that "I think we're pretty much expected to build whatever skills are needed for whatever project" (p. 3). At the MHM, while the Director does not have a formal performance or learning plan, the

staff who report to her do prepare annual plans and identify learning goals. However, "we don't necessarily do all of them, and often a learning opportunity will come up that we didn't anticipate" (Curator, Personal Interview, November 24, 2009, p. 3). While there are organizational processes that do encourage periodic reflection on learning needs for practice in each case setting, significant gaps between intention and reality are visible. The pressures of demanding positions and immediate priorities clearly inhibit engagement in systematic learning activities, in keeping with Kirwan's (2009) observation that "work overload and a focus on short-term goals mitigate against people finding the time to reflect on and experiment with new learning" (p. 117). Inconsistent implementation of learning goals may also be due to the nature of human resource management practices in these case settings. While each seems well-organized around staff recruitment and management, the developmental side of human resource management is not evident. In the Parks Canada setting, human resource management staff play a coordinating role for mandatory training. However, no mention was made in any case setting of HR staff playing an influential role in exploring individual learning priorities.

An unanticipated theme in each case setting was a priority to develop knowledge associated with collections and exhibitions rather than knowledge for museological practice. Given pressures of time and limited resources in each setting, respondents comment that "the content areas are the ones that get the most engagement from staff. When we have talked about…different areas of practice within the museum, that doesn't get as much interest" (VP, HDM, p. 10); or that "so as far as history and curatorial [topics] and lots of stuff like that...learning is encouraged...but as far as knowledge of how we should be doing what it is we do, [this] hasn't had much in the way of a high profile here" (Supervisor, FoL, p. 12).

Fuller and Unwin offer a continuum model of organization-level approaches to workforce development that identifies nine features of a work environment that influence the extent to which the organization either encourages or inhibits learning. They base this on evidence from empirical research that shows that an expansive organizational environment, one that is open to and supportive of individually championed knowledge, "is likely to increase the quantity and range of opportunities for [learner] participation and therefore for employee learning" (2004, p. 131). While Fuller and Unwin do not specifically relate their model to climate for transfer, Eraut's contention that considerable subsequent post-course learning is required to facilitate transfer reinforces the importance of general organizational supports for learning in the workplace. When the four cases are evaluated in the context of this model, they exhibit

neutral or restrictive conditions for learning, with the exception of FoL where long-serving staff bring deep knowledge and skills to their positions, and MHM which emerged as expansive on characteristics associated with team-based approaches to work and the quality of supports for CPE. The following table indicates where each of the case settings are likely to be positioned, based on my analysis of accounts of learning and transfer provided by respondents and on associated documents. While such a table does not present nuanced circumstances in each category, it highlights patterns across the cases and suggests that, for the most part, the settings do not offer fully developed settings for the learning that is needed to implement transfer.

Approaches to Workforce Development[29] (Fuller & Unwin, 2011, p. 52)				
EXPANSIVE QUALITIES	**Position on Continuum of Approaches to Workforce Development**			**RESTRICTIVE QUALITIES**
	Expansive	**Neutral**	**Restrictive**	
Participation in different communities of practice is encouraged — job/team boundaries can be crossed	**MHM,** based on extensive interaction with professional and community groups; boundary crossing encouraged by small and collegial organizational environment.	**GH,** based on strong affiliation with Haida Nation, but limited involvement with external professional groups	**HDM,** based on limited involvement with professional groups; some boundary crossing in team-based projects **FoL,** based on limited involvement with community and professional groups and siloed structure	Participation restricted to immediate work team area — boundary crossing discouraged
Primary community of practice has shared 'participative memory'	**FoL,** based on staff's longevity in their positions and reliance of internally articulated norms for practice	**MHM, GH,** based on considerable turn-over in staff along with reliance on professional or Haida norms	**HDM,** based on considerable turnover of staff and lack of clearly articulated norms for practice	Primary community of practice operates without reference to cumulative expertise
Vision of workplace learning — career progression		**MHM,** based on affiliation with professional groups, but progression limited by size of organization. **FoL, GH,** based on limited learning planning, although opportunities to move to senior levels are present	**HDM,** based on limited vision or attention to workplace learning	Short termism — get the job done

[29] This 2011 continuum model is a compressed and revised version of the 2004 model (Fuller & Unwin) and is referenced in Chapters 5, 6 and 7 to assess organizational environments in the case settings.

EXPANSIVE QUALITIES	Position on Continuum of Approaches to Workforce Development			RESTRICTIVE QUALITIES
	Expansive	Neutral	Restrictive	
Recognition and support for workers as learners—newcomers (including trainees) given time to become full members of the community	**MHM,** based on explicit organizational supports for learning, although limited by resources and lack of planning	**FoL, GH**, based on strong organizational supports, but, but limited by local implementation of policy	**HDM,** based on absence of explicit employee development strategies	Workers seen only as productive units—fast transition from newcomer/ trainee to fully productive worker
Workforce development used as a vehicle for aligning goals of the organization and of the individual		**FoL, GH,** based on clearly expressed goals for both organization and individual as noted, in the Learning Policy, but limited by absence of local alignment	**HDM,** based on lack of organizational supports for learning **MHM,** based on lack of strategic organizational vision for workforce development	Workforce development used only to tailor individual capability to organizational goals
Skills widely distributed through workplace—multi-dimensional concept of expertise		**MHM,** based on need for cross-functional understanding, but limited by size of organization and reliance on individual autonomy/initiative **HDM,** based on team-based approaches, but limited by adherence to specialized roles	**FoL, GH** based on specialized work roles and siloed management and decision-making structures. At GH in particular, specialists are isolated from collegial networks.	Polarized distribution of skills—knowledge/expertise regarded as confined to key workers
Planned time off-the-job for reflection and deeper learning beyond immediate job requirements	**MHM,** based on commitment to external CPE if funding and opportunity permit	**FoL, GH,** based on general reliance on in-house training systems, although some external training is supported	**HDM,** based on absence of supports for external engagement in professional and learning activities	All training on-the-job and limited to immediate job requirements
Managers given time to support workforce development and facilitate workplace learning		**HDM, MHM,** based on supportive supervisory relations, but limited by absence of strategic vision for individual development	**FoL, GH,** based on structure of supervisory roles, but further limited by absence of strategic vision for individual development	Managers restricted to controlling workforce and meeting targets
Workers given discretion to make judgements and contribute to decision-making	**MHM**, based on extensive positional autonomy	**HDM, FoL,** and **GH,** based on varied, often circumscribed positional autonomy		Discretion limited to key workers—no employee involvement in workplace decisions

Table 8. Approaches to workforce development in case settings

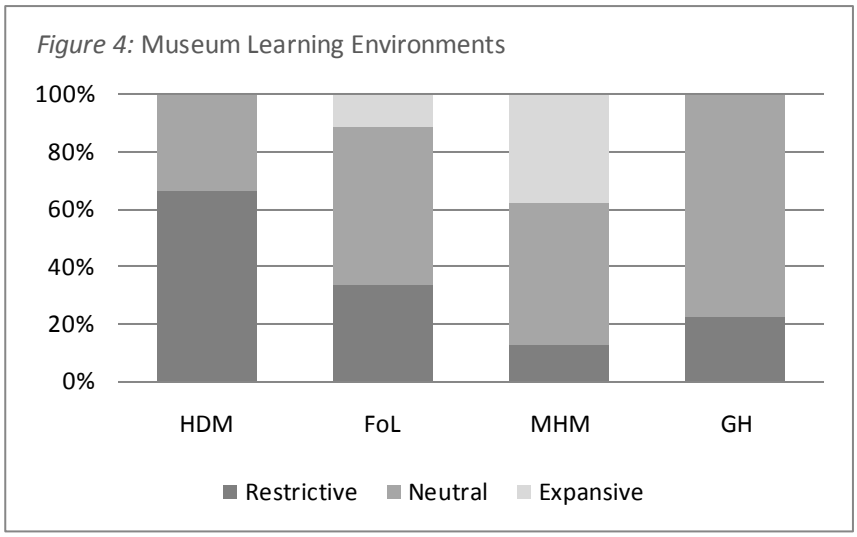


Figure 4. Museum learning environments

While graphing the frequency with which each setting appears within expansive, neutral and restrictive categories (Figure 4) masks detail, it does provide a synopsis of the climates for learning—and for the learning that is specifically involved in transfer—and illustrates that no situation is solely expansive or restrictive. This analysis suggests that the cases offer both inconsistent and somewhat restrictive learning environments, in that these museums do not link learning with organizational and career development goals and do not offer strong management supports for learning and development. Several other observations seem relevant to climate for transfer in these settings:

- The smallest museum, with its collegial relations and accessible decision-making structure, demonstrates the most expansive environment for learning and shows particular strength in cross-functional learning and active supports for participation in learning activities
- The museum that lacks formal policy, funding and encouragement for CPE emerges as a largely restrictive learning environment, although teamwork in the production of exhibitions creates somewhat expansive conditions for interaction and learning in such circumstances.
- The museums that are components of a large complex organization benefit from clearly articulated learning policies and procedures, but show inconsistencies in their application at the local level, thereby positioning them as neutral to restrictive environments

- The tendency across case settings for specialized and segregated positions, whether due to the size of the institution or design of the work, makes boundary-crossing arduous.

These patterns are aligned with a British study of learning for museum practice that notes that "...the basic building blocks of workforce development, such as personal development plans for all members of staff and training budgets are patchy" and that "...there is little evidence that workforce development is based on a conception of the whole organisation" (Demos, 2003, p. 24). While Parks Canada's goals may, when fully implemented, create more holistic learning conditions in these particular case settings, at present organizational approaches to professional development across all four cases are not strategically linked with organizational outcomes. Conditions for transfer, like conditions for learning, seem inconsistent and somewhat restrictive.

Pressures for change

The need to cope with change is perceived as a catalyst for learning in the museum sector (Hooper-Greenhill, 2000; Matelic, 2008) and for transfer, particularly when the organization is intentionally considering ways to adapt to pressures in its environment (Sessa & London, 2006). Like many other museums, each case setting is engaged in change processes in ways that can be seen to variably impact these climates for transfer. At the MHM for example, change is primarily linked with an expanded role in caring for heritage properties and with negotiating access to a higher-profile space. While plans to animate these changes do not highlight needs for new skills, the MHM and its parent bodies are receptive to new concepts that support the management of these largely positive developments. For example, Ramsden used strategic planning skills gained through coursework to facilitate planning processes.

In the mid-size HDM, pressures to address funding shortfalls through additional exhibitions have increased workloads and reduced resources, including time, for learning and associated transfer activities. At the same time, however, pressures for high quality exhibitions make both the organization and the staff receptive to measures that will allow for innovation. The Preparator offered a useful synopsis of the interdependence of the museum and its staff in coping with current pressures:

> Most people at this museum are here [because] they love it. But they're [also] here because they have to provide shelter and food for themselves and their families. Ultimately what that means is that if our visitors like this place, they want to come back.

> If they want to keep it open, if they want to give money, then our jobs are more secure. If our jobs are more secure, we have a better sense of well-being, we can do a better job because we're calmer. We're more into it. If I'm stressed because I don't know if we're going to close or not, then I can't put all my energy into making the best opium den or whatever I need to do. I think that relates to everybody here. (p. 9)

From a transfer perspective, the climate at HDM is particularly supportive of the integration of new concepts that are championed by individuals who argue for their relevance.

At both FoL and GH, system-wide efforts to address declining public interest and attendance are creating "the largest, most sweeping changes" in recent years (FoL, Curator, p. 4) in order to integrate visitor experience and community engagement in all functional areas. On one hand this "incredible change" (Manager, GH, p. 5) is problematic. Existing staff in public programming roles are asked to apply for newly designed positions that require expertise in the broader and more holistic concept of visitor experience. At both FoL and GH it is noted that some employees may not be successful in this process—but, at the same time, current employees are not seen to engage in learning activities to build their skills in this area (Coordinator, FoL, p. 5). For those whose jobs are not immediately threatened, a shift in emphasis to visitor experience from cultural stewardship is still worrying. The Conservator at FoL notes, "...how does this impact the collection? Are we going to start using the collection until it's destroyed and then toss it out?" I'm not comfortable with that whole business" (p. 11). On the other hand, change highlights the value of new approaches to practice. For example, it is energizing for Fougère, who credits shifting priorities for creating the conditions in which she can advocate for both culinary programming and community initiatives. As the FoL Manager of CRM comments, if he was hiring in this changing environment, he would seek somebody who is "creative, who doesn't have a box around them, who has a totally different way of looking archaeological resources, museum objects, curating, conserving… Every professional has tunnel vision, because they're a professional…it takes coaching and guidance to come into the 21st Century" (p. 2).

The likelihood of learning and transfer activity that is animated by change in these cases seems linked with the nature and extent of organizational planning, since planning creates goals that contextualize work and influences supports for development. In both Parks Canada settings, strategic and management planning at corporate and local levels is described as influential in establishing priorities and performance goals. Although learning requirements to support new initiatives are not articulated in plans, supervisors and staff can identify

competency gaps as they determine the ways in which their detailed work plans contribute to the achievement of organizational goals. Plans set the stage for learning and transfer in these systems, but they also inhibit transfer when newly acquired concepts and practices are not aligned with priorities—instead, new concepts may be integrated in future planning as the system as a whole embraces related goals or as the learner exercises agency in advocating for new practices. Fougère at FoL, for example, could not act on her interest in applying community engagement principles until Parks Canada strengthened its commitment to stronger community relations, and she notes that even easily transferrable content must await either funding or approvals as required.

At the small MHM, municipal, foundation and museum-specific plans establish frameworks for performance planning although, like the Parks Canada cases, the onus normally rests with the employee to identify new skill requirements or suggest innovative practices that align with goals. The Director of MHM comments that museum priorities "are [set] within the larger framework of the strategic plan...how we do it is very much left to our own experience and abilities" (Ramsden, p. 3). In this relatively small and collegial setting, employees are more readily positioned to advocate for training and the application of new knowledge in personal and immediate ways that respond to gentle pressures for change over time.

At HDM, planning is focussed on immediate priorities rather than longer term goals. This influences staffs' capacity to establish performance goals and skills expectations. On one hand, a desire to extend the scope of planning is noted by staff who comment "it's important to have objectives...so that people get a sense of where we're moving..." (Designer, p. 13). On the other, the flexibility inherent in the system enables individuals to come forward and advocate for initiatives on an ad hoc basis. As Johnson comments "there is a lot of practicalness to what we're doing. Sometimes we just go with ideas and see where we end up" (p. 24).

Examined in terms of Matelic's (2008, p. 9) 'Conditions for Organizational Change' rubric, the four cases tend to exhibit features that either inhibit or do not animate change. My efforts to position cases in relation to opportunities and constraints suggested by Matelic are based on an assessment of conditions described in interviews and documentation. The dotted lines between opportunity and constraint positions are intended to convey the notion of a continuum:

Facilitating and Inhibiting Conditions for Organizational Change in History Organizations				
Opportunities: conditions facilitating change	⇔			**Constraints:** conditions inhibiting change
Relatively unstable environment, crisis	HDM	FoL	GH MHM	Relatively stable environment
Dramatic shifts and/or decline in attendance, financial support	FoL HDM	GH	MHM	Gradual increase in attendance, financial support
Support for new and/or experimental programs, exhibits, events, with focus on visitor experiences, external input	FoL	GH HDM	MHM	Modest changes and/or revisions in programs, exhibits, events, with focus on scholarship, internal expertise/input
Major expansion of collections and/or facilities			All cases	Slight growth in collections and/or facilities
Staff salaries/benefits stable/declining, but HR (human resources) viewed as important organizational investment		All cases		Small but steady increases in staff/benefits, but HR (human resources) viewed as significant organizational cost
Strong support for new direction/initiatives, e.g., new grants, new legislation, community engagement initiatives		All cases		Strong resistance to change from internal stakeholders, e.g., board members, professional staff, volunteers w/ long tenure
Director/CEO: new, with mandate and support for change and transformation	FoL	MHM GH HDM		Director/CEO: long tenure, support for status quo, established control systems
Support for risk and shared power—decentralized structures	GH	MHM FoL	HDM	Fear of risk, loss of power and control—centralized structures
Changing community, new expectations, lack of awareness or support for organization	FoL	HDM GH	MHM	Relatively stable community support, traditional expectations, and awareness of organization
Support for new professional initiatives, trends, and mandates	MHM	FoL GH	HDM	Insulation from professional initiatives, trends and mandates
Culture of learning, new mindset of museums as community-driven organizations (continually transforming themselves)		All cases		Culture of preserving tradition and norms, conservative mindset ("museums don't change")
Effectiveness paradigm: long term outcomes, value placed on qualitative measures, e.g., learning, systems thinking, group processes, new partnerships		MHM GH	HDM FoL	Efficiency paradigm: short term focus, value placed on quantitative measures, e.g., attendance figures, bottom line, balancing budget, productivity from tasks

Table 9. Facilitating and inhibiting conditions for organizational change

While Matelic's classification does not capture situated nuances—and it mixes pressures for change with capacity to respond to change—it does serve to indicate that each organization is experiencing contemporary pressures or triggers for change in different ways, and that organizational capacity to respond to the particular changes at hand varies according to values, systems, and resources. For example, while HDM and FoL are coping with significant concerns about attendance, FoL's fit within a much larger organization system with relatively stable resources, allows it to deal with change over a longer term and in a more planned manner.

Sessa and London's matrix (2006, Figure 1.3, p. 11), that illustrates how varied conditions impact organization learning in the face of change, offers a useful although also reductive means of suggesting the likelihood of learning across the four sites. However, as several cases do not fit neatly within the oppositional categories suggested by Sessa and London, my addition of intermediate categories illustrates the capacity of such models to only present generalized organizational dynamics:

		Organizational Readiness for Change		
		Not Ready	**Somewhat Ready**	**Ready**
Pressures for Change in the Environment	**Low**	*Status Quo*	*Limited perceptions of need for change; persistence leads to occasional success:*	*Frustration, disappointment, struggle; persistence leads to success:*
	Moderate	*Limited perceptions of need for change; learning failure beyond adaptation*	*Moderate perceptions of need for change despite systematic constraints; persistence leads to success*: **FoL, GH**	*Selective supports for priority learning; persistence leads to success:* **MHM**
	High	*Learning failure beyond adaptation*	*Inconsistent pressures for learning to cope with change:* **HDM**	*Continuous learning*:

Table 10. Likelihood of organizational learning in case settings

In recognizing a middle ground between not ready/ready and low/high pressures for change, this adapted matrix suggests that while learning is taking place in all the case settings, none can claim that continuous learning is an organizational characteristic. In the face of largely moderate pressures for change, learning is selective and inconsistent, and requires a degree of persistence from the learners themselves to negotiate the organizational climate to achieve

success. At the HDM, where I argue that pressures of change are relatively high, the absence of systems to support professional development leads to inconsistency in learning supports. Given that the likelihood of transfer seems integrally connected to organizational receptivity for learning, this model is useful in also suggesting the climate for transfer in each setting.

This discussion has focussed on internal pressures for change as this tends to be the focus in the literature. However, external pressures for change and expectations of performance also impact learners' transfer experiences in each case setting. For example, at MHM, Ramsden is very attentive to the interests of community and considers its needs in making use of values-based management frameworks. At HDM, references are made to ways in which staff are inspired and guided by the expectations of diverse communities in the region. Johnson comments that her capacity to serve communities lies at the heart of her practice and she also notes that her curatorial project was strongly influenced by conditions set by an external funding body. At GH, Wilson's work—and the use of her learning—is clearly shaped by the expectations of Haida elders and community members, and Fougère at FoL is responding to community interests in advocating for more consultative management practices. Since these museums are characterized by their service to communities, the influence of pressures of change on transfer climate must also take into consideration external stakeholder relations and expectations.

Reflection on organizational climates for transfer

It is evident that, despite their differences, each of these museum case settings offers meaningful, creative and professionalized environments for specialized museological practice. On one hand, this generates receptivity for best practices particularly if they are aligned with priorities that help them address change. On the other hand, like other busy workplaces that are "not normally focussed on learning, but which value learning as an inherent aspect of competitive positioning" (Rainbird et al., 2004a), the implicit values and the explicit policies, plans and systems they have in place to support continuous learning—and a positive transfer climate—vary according to the nature and size of the organization. While the degree to which learning is rationalized and supported varies somewhat across these cases settings, none make an explicit link between competency requirements and the achievement of strategic goals.

Position factors

While organizational factors establish the overall climate for transfer, the more immediate factors that shape day-to-day work are also seen as influential in the likelihood that new learning will be applied in these settings. These themes include:

- job design and level
- performance expectations
- supervisory and collegial supports
- timely opportunities for transfer
- similarity and relevance to task requirements
- available resources

Job design and level

The nature of the work undertaken in learners' positions, the degree to which new practices are relevant, the complexity of those practices, and job-specific performance expectations emerge as influential in transfer at all the case sites. A notable characteristic in each museum is the degree to which the CRM graduate's job involves unique and situated work. Regardless of the size or complexity of the organization, each person I spoke with filled a specialized role that was not replicated elsewhere in the organization. Accordingly, all of the CRM graduates and many of their colleagues identify as and are regarded by colleagues as somewhat autonomous professionals who tend to determine their day-to-day approaches to work and establish their own learning goals and strategies. While their independence may be circumscribed by team relations and organizational procedures and priorities, there is a consistent pattern that they exercise considerable judgement in the knowledge and skills they use in daily practice. As the curator at HDM notes, "you better be your own task master—and be able...to see what needs to be done and do it, because no one understands your exhibit enough to tell you what you need to do" (p. 13). In every case setting, senior managers comment that they regard their staff as professionals, and observe that they themselves lacked specialized knowledge that enables them to closely supervise and monitor the quality of learners' work. From a transfer perspective, this appears to place the onus for controlling specialized practice and associated learning and development on the learner.

Different types of positions across case settings experience different transfer dynamics. Collections management tasks for example are repeatedly cited at HDM, FoL and MHM as

involving straightforward transfer, in that the procedural knowledge and skills taught in the CRM classroom tend to be readily applicable in the work setting. The degree to which such knowledge is transferrable is also enhanced by the generally solitary and self-determined nature of collections management work and the lack of widespread implications for other positions. "...the hands-on collections stuff I found very easy...It's my realm, I guess, and people don't know enough about it to [intervene]... It's nice to be able to use my knowledge where I see that it's going to work the best for what we have" (HDM, Johnson, p. 36-37). As Johnson's supervisor notes, "I've found that people who work in those areas typically are more autonomous" (VP, p. 16). Because Wilson at GH does not manage collections, this discussion did not arise. However, near transfer in collections tasks is also observed at FoL:

> It's easy because there seems to be less outside involvement for us with regard to what we want to do with the collection. Curatorial decides basically how [policy is applied]...we have the freedom...to display the collection.... If something is against a window, we say "that's not a good practice to have the light flowing in against this tapestry. Let's go back and see where we can move that." Or [with] a painting in a stairwell, we'll say "okay, that's not a great place for that painting, let's move that." Those are smaller [decisions], they don't have an impact on what everybody else is doing... (Fougère, p. 35)

Conversely, transfer associated with more complex conservation, exhibition design, curatorial activities or public programming jobs is described as relatively challenging since these jobs typically involve team-based decision-making and production. When confronted with decisions associated with conservation interventions, Johnson at HDM comments "you need other peoples' perspectives on how to take care of that collection. It's never just your own decision" (p. 35). Complexity can be seen to inhibit transfer. "The stuff I'm still struggling with is project management—when you have [to work with] multiple personalities" (p. 9). In the small museum "no one can stand alone…and do their own thing…We have to work together, to coalesce. If one isn't following the same cycle, it breaks down completely" (Programmer, p. 4).

An area associated with the design of work in these settings that is only briefly noted in the transfer literature is the degree of creativity that learners are expected to exercise, at least in some aspects of their work. Awoniyi et al. (2002) suggest that as the creativity involved in work increases, so does transfer of training. They speculate that this is linked with increasing degrees of positional autonomy, and results in lower stress levels and higher job satisfaction. Whether linked with exhibition design, curatorial processes that communicate meaningful stories about collections, or management processes that call for innovation and problem

solving, learners in all cases remarked on the inherent creativity of their work. While I did not specifically seek to explore creativity as a characteristic of job design or as a transfer factor, the comments that learners and colleagues offer suggest that creativity is a characteristic of many positions in the case museums and might therefore be influential in learning and transfer.

The Alberta Museums Association holds that "the on-going acquisition of knowledge and skills, and the cultivation of creative ideas are fundamental to the pursuit of excellence" (AMA, 2007). This aligns with the view of the ED of the Foundation that runs MHM, who maintains that the work of the units that comprise the AHF is creative and stimulating by its very nature (ED, p. 11). At FoL, the CRMU Manager offers a more guarded description of the role of creativity in the work of his unit. On one hand he stresses that the CRMU at the Fortress has a reputation for innovation in its approaches to both policy and practice in heritage stewardship: "we are the leaders. We carry the [Cultural Resources] flag...we're looked upon as innovative" (Mgr, p. 13). On the other hand, he recognizes that Parks Canada rules and regulations for practice inhibit innovation. "It's a government agency. Many times a young creative professional…get[s] shocked that they can't do this, they can't do that. There are very strict protocols, guidelines and standards to follow" (p. 4). This structure carries into job design, particularly for Fougère in her collections role. The Manager notes that "…she's not being asked to be creative [in her position]...she could have stayed in that job...forever and ever, amen" (p. 12), but adds that personal rather than positional creativity prompted her to seek new skills and expand the boundaries of her work to more creative areas in public programming.

Of the four settings, creativity is discussed and valued most explicitly at HDM. This may be because the unit on which I focussed deals with exhibitions and involves people whose work is grounded in creative processes. The Preparator notes that in a single day he might make:

> ... a realistic looking rock, and then...a pack rat den for kids, and then move over here and make an exact duplicate of a trunk [from 1840.... I love it! It's super-creative. The best thing about this job is that there is such a huge amount of work that needs to be done. (p. 8).

The Designer at HDM also remarks on the creativity of his work, but observes that his positional capacity to exercise creativity is tempered somewhat by the degree of engagement and/or control that others choose to exercise in varied projects (p. 8).

The emphasis on creativity at HDM might also be due to the absence of prescriptive plans that direct work. In this environment, the design of work enables individuals to bring

forward ideas for exhibitions and other projects that are grounded in their interests and demand a creative approach. Johnson, for example, initiated her curatorial project after taking the *Curatorship* course, and the Curator has a long list of exhibitions that have been initiated as a result of his expertise and creative approach to telling stories of the region. Beyond opportunities to create exhibitions, Johnson comments that the challenges of management have required a degree of inventiveness. "I usually can have a decent conversation and come out with a solution-oriented way to deal with [a problem]. I'm not afraid to be creative" (p. 15).

This discussion highlights the interdependence that is likely to be associated with the role of creativity in transfer. As Awoniyi et al. (2002) note, "the environment in which people work significantly relates to the creativity of the work they produce" (p. 31). The work of museums, particularly in exhibition design and curatorial tasks, is inherently imaginative and inventive, locating affordances for creativity as a positional factor in transfer. At the same time, several learners and colleagues indicate that they bring creative skills to their practice, and go beyond job expectations in some cases to exercise creativity. As transfer processes involved in the adaptation of content to meet the situated needs of jobs in these settings seem inherently creative as well, this aspect of job design seems worthy of further research.

Performance expectations

As noted, generalized position descriptions and inconsistent performance and developmental planning and goal setting are observed in each case setting, thereby limiting the degree to which day-to-day work planning and associated learning are formally linked with strategic organizational goals. While this varies from case to case, depending upon the thoroughness of annual organizational and task planning, it is evident that each worker exercises considerable autonomy in regulating their local and daily practices. This is, in part, due to the tacit reliance noted in each case setting on externally articulated professional performance standards that place the onus on autonomous professionals to set their individual learning and work goals in the context of organizational plans. As Ramsden notes, "we're the ones with the knowledge…we know what standards should be. It [is] our job to make sure that the museum is being run according to best practices" (p. 3).

In such environments, decisions to participate in the CRM program across all four settings have been voluntary and largely self-directed, and while course selection is informed in each case by learners' perceptions of current and future position requirements as well as by

interest, the content does not normally relate directly to immediate challenges in the workplace. A degree of isolation, supervisory deference to perceived professional expertise, and lack of clear position descriptions also place the onus on the learner to establish and work toward personally set performance expectations for both learning and transfer. The Presentation Specialist at Gwaii Haanas comments on the degree to which colleagues whose positions are well defined have both autonomy and capacity to introduce new practices:

> ...in some cases it's because their job is very well defined and the expectations are really consistent and clear. And the person is known to be very reliable and good at it. There are other places where the job is less well defined and neither the supervisor nor the person in the job seems to be quite sure of what's happening. (p. 7)

She goes on to comment that the autonomy inherent in her position has its strengths and weaknesses. "Having autonomy is nice, but…sometimes getting a bit more feedback would be good. ...sometimes I feel I'd like more time to sit down with managers and say 'Is there anything you'd like us to be doing differently?' I sort of get the feeling that there must be" (p. 9). In each museum, performance goals are described in broadly generalized terms that suggest that they do not strongly drive day-to-day work. Furthermore, since engaging in CRM studies is variously motivated by a desire for a credential, enjoyment in the process of learning, curiosity about new areas of practice, as well as a generalized desire for content mastery, strong performance-related learning expectations are not evident in these cases. The absence of detailed performance expectations in these professionalized settings also creates ambiguity around expectations for transfer, also noted by Clarke (2002) in his study of human service workers. Since CPE has been undertaken for largely personal rather than organizational development reasons, transfer in these settings seems consistent with Clarke's observation that:

> ...workers are free to choose which if any of the training they might want to use in order to subsequently improve or enhance their work practice. In this respect one might theorise that these workers consider that they already possess the appropriate skills and knowledge required for undertaking the tasks associated with their jobs (or else why would they have been employed?) and that the main aim associated with in-service training that is offered is merely that of 'topping-up' or developing one's personal self. It then becomes a matter of personal choice whether to implement any, if at all, of the training received. (p. 155)

This is reflected in the comment of the Conservator at MHM who observes that "I've never been in a situation where someone has said 'well if you're going to perform this function you're going to need this education or this experience.' With training [I undertook to support a

building assessment] project...that was again my own initiative" (p. 7). She goes on to state that, although she judged the training to be important to her capacity to do the project, no one encouraged her to participate or monitored the use of the acquired skills in the project.

These cases suggest that when performance and learning expectations are unclear, expectations for transfer are also unclear—or nonexistent—and the success of transfer becomes largely contingent of the agency that the learner chooses to or is able to exercise.

Supervisory and collegial supports

Many transfer scholars see supervisory supports as important since work priorities, performance and training plans, goal setting, resource allocation, evaluation, feedback and rewards are all determined through formal and informal interactions between the learner and the manager (e.g., Hughes, 2004; Kirwan, 2009; Tasse & Hrimech, 2003). While supervisors across all four case settings hold positive collegial relationships with CRM graduates and play active roles in managing work priorities and allocating resources, they are not strongly engaged in planning and supporting learning or transfer. Supervisors acknowledge that the provision of supports that might be in place to strategically plan for learning and to create conditions for transfer tend to be a low priority. Fougère's supervisor at FoL for example, comments, "you know, sometimes a manager will be enthusiastic about that, but more often, no, not so much…" (Curator, p. 9). At HDM, Johnson's supervisor also reflects that formal follow-up and systematic implementation of training needs that are noted in annual performance plans tends to be rare, and attributes a low level of supervisory engagement to competing demands for "time…and just a lack of interest" on the part of both staff and supervisors who are preoccupied with day-to-day work (VP, p. 10). And in several cases, given the autonomy and specialized skills inherent in CRM graduates' positions, supervisors observe that they do not hold the task-specific knowledge needed to establish learning and transfer priorities and do not see the need to intervene in day-to-day matters. At FoL, the Conservator comments that "it's a kind of philosophy [at the supervisory level]: 'you're the professional, you tell me'" (p. 15), while the Researcher observes that her learning is rarely initiated at the supervisory level: "If I had chosen to just keep doing what I was doing, there wouldn't have been [consequences] ...we really have to have the conviction and the drive to push…as an individual" (p. 12). At GH, Wilson observes that she gets "very little direction as far as I can understand. When [my supervisor] says to me 'you're a professional' [that's the] end of the discussion" (p. 9). Ramsden's supervisor comments that

"the core expertise and the principal-centred work that we do [in the Museum] lives very much with the Director of the Museum. ...She is kind of like the earth's core, the magnetic pull that keeps it all together" (ED, p. 5).

Low supervisory involvement in learning and transfer processes is often observed in transfer studies across various sectors. Kirwan (2009) suggests that disengaged behaviours can be placed in two categories: indifference or active resistance, with indifference being the more common. Lack of perceived benefit, discomfort with new practices, resistance to the increased complexity of management tasks that may result from new practices or loss of control are identified as causes of resistant supervisory behaviours. In these case settings, the lack of active supervisory engagement is not generally characterized as a negative phenomenon. Supervisory relations are described as positive and collegial, but largely trusting and uninvolved in the either the day-to-day decision-making around autonomous activities, or the longer-term strategic identification of skills needs. Yelon and Ford (1999) suggest that this may be typical in professionalized settings. Learners' comments about supervisory supports for learning and transfer indicate that supervisors are busy, feel confident of the judgement exercised by their staff, hold expectations that professionals must plan for themselves, are somewhat sceptical of performance planning processes, and are not attentive to the strategic organizational and personal benefits of CPE. In every case, supervisors indicate that provisions for pre- and post-course transfer activities including goal setting, debriefing and coaching are rare and always casual, whether this relates to job-specific workshops and other training, or content gained through CRM. For example, Wilson's supervisor at Gwaii Haanas states:

> If they want to brief me, then I'm happy to be briefed. …What more do I need to do? I don't need to do any more.... These are professionals. I don't need to hold their hand.... I need to discuss with them what they need to do, support them, and then they get on with it. (p. 7)

Supervisors' lack of involvement in choosing, supporting and debriefing participation in the Cultural Resource Management program and its generalized courses leads, in turn, to a lack of strategic appreciation of the content and its fit with local practice. While supervisors across the museum settings appear to trust their employees to recognize the relevance of their self-initiated learning, several learners indicate a desire for feedback. Fougère for example stresses that when she is involved in learning, she always seeks to discuss outcomes with colleagues and

with her supervisor (p. 3). And at MHM, the director notes that "it's a little bit surprising that there's not more interest shown" (p. 13) in her learning and its outcomes.

Observations from all CRM graduates and colleagues highlight a notable pattern that their museums expect that efforts to learn and apply new knowledge will be largely self-initiated. At the MHM, the Programmer comments "I know what's expected of me...no one is looking over my shoulder" (p. 7). While this museum is supportive of learning, the onus for identifying and acting on learning needs tends to rest with the individual. The Director notes "it's almost a 100% driven by myself" (p. 13). She adds that while she has never encountered resistance to self-initiated learning activities, "there was never active encouragement, it was always 'oh, that's great—off you go,' but there was never a push."

Respondents at other sites describe similar experiences. In Gwaii Haanas, the supervisor of the Ecosystems group stresses that he does not intervene to identify learning needs since this is something that individuals are positioned to do (Manager, p. 7). Wilson indicates that she initiated her CRM involvement and, while she received financial support and time for participation in accordance with the GH Agreement in the early years, she encountered obstacles to completing the program from a former supervisor in the late '90s. While this resistance was eventually overruled by a more senior manager, it is evident that without persistence on her part, she would not have completed her studies. Her colleagues also confirm that their learning is largely self-initiated. The Data Specialist notes that "I prefer to initiate myself because I don't like people telling me what to do, no one does (p. 3). At HDM, learning activities are not initiated by the museum. "I think it's due to budget, there's really not a lot. It's really your own initiative…. If you have a go-getter in a department, they're the ones who will get it going" (Johnson, p. 11).

At Fortress of Louisbourg, where there is considerable access to in-house training, information on such activities is circulated among staff, attendance is supported through funding and time, and supervisors may play a role in encouraging participation. While such supports make participation straightforward, the onus still rests on the employee to initiate learning processes that are not defined as mandatory. The Historian notes "I would say my learning is probably 95% from me" (p. 12). Fougère's involvement in other external learning activities, including the CRM program is self-initiated but supported.

> That was something that I wanted to do. I felt I should have a better handle on the basic principles and practices of CRM, and I was right. It has given me lots of foundation, so I

> wasn't wrong in that. I wanted to be on a better level than what I was before. It was something that really interested me, so I wanted to know more…. I got that encouragement from my workplace. They said "yes." (p. 18)

With specific reference to their involvement in the CRM program, each of the graduates indicates that supervisors played no role in the selection of courses within their studies. "I thought the [elective] courses that I took would help me with my job skills here at work and had a connection to what we were doing" (Fougère, p. 22). "I looked at what I thought I needed, and I looked at what I was doing on the ground, and tried to make the courses be relevant to what I was doing" (Wilson, p. 18). These CRM graduates also observe that although supervisors and colleagues are not familiar with the details of topics that they have studied, their participation in coursework accords them increased authority and perceived status.

While supervisors are not influential in planning for and supporting learning and transfer in these settings, respondents note considerable success in putting their learning to work. This seems aligned with observations by a handful of transfer scholars who suggest that the independence and self-efficacy of the worker may impact the degree to which supervisory interventions through performance planning, goal setting, coaching and assessment are necessary or even welcomed (Awoniyi et al., 2002; Chiaburu & Marinova, 2005; Facteau et al., 1995; Velada & Caetano, 2007). Certainly in these cases, while learners indicate an interest in stronger supervisory involvement, their positional and personal autonomy, confidence and initiative, described in more detail in the following section on agency, enable them to operate effectively within these lightly supervised relationships.

Collegial supports are also perceived as important in transfer. As Billett (2002) notes "affiliations may determine how information is shared and with whom, how work is distributed, and how individuals' efforts are acknowledged and judged" (p. 37). Workgroup climate is noted as such a strong indicator in transfer by Gilley and Hoekstra (2003) that they see it as core to research in this area. In the case settings, collegial supports for transfer are largely encouraging. At the HDM, "the ideas just flow...we don't say 'no' to any idea. We'll at least consider it. It's kind of cool" (Johnson, p. 23). Fougère notes that teamwork is essential in cross-functional tasks. "…we're a much larger organization. The curator is different from the exhibit designer, is different from the conservator. So you need other peoples' perspectives on how to take care of that collection. It's never just your own decision" (p. 9). Since Fougère also states that she can

act autonomously in some situations, these apparently contradictory statements illustrate the continuum of complexity and autonomy inherent in her work and her capacity for transfer.

An important role of colleagues at MHM is to 'take care of business' while the learner devotes time to the development of new ideas. The Curator notes that Ramsden's efforts to organize and support the organizational integration of heritage structures has been possible since the museum is well managed: "she has made great strides in that side of things. That may be because we do have a fairly strong team here and she has been able to focus there and know that things won't fall apart on this end" (p. 8). Supportive collegial networks have been instrumental in Fougère's efforts to explore her learning in a local context as well. She notes that while she was taking distance education courses, colleagues became intrigued by online postings. "I'd come in to the work the next day [and] say 'well guess what happened last night on the course?' It's almost like a soap opera" (p. 16). As she moved on to new projects that were outside the scope of her formal position, she partnered with colleagues who contributed curatorial, research and conservation skills to the initiative.

Nevertheless, team-based projects require relational skills to ensure that new practices are aligned with others' priorities and work functions. As Ramsden at MHM notes, "If you throw new ideas into the mix too quickly they can get rejected because of fear that it's too much for the workload. …Sometimes it's really a question of going back in with an idea and talking about it in very general terms…" (p. 4). At FoL, collegial resistance to Fougère's newly acquired interest in visitor experience is described. This is attributed to discomfort with new ideas that other staff had not been exposed to, along with concern about authority and control. This is consistent with observations in the literature regarding collegial reactions to boundary crossing which threatens established practices (Edwards, 2010). While Fougère's enthusiasm for testing concepts that are outside the scope of her position has raised some concerns, the importance of greater collaboration across areas is recognized by her manager. "When you cross that boundary into somebody else's back yard, you get 'you're in my back yard, get out.' We're taking down those barriers, we're taking down those fences…. That way we will develop a team" (Curator, p. 13).

Timely and sustained opportunities for transfer

CRM graduates describe aspects of their learning experiences as exciting, even transformational (Fougère, p. 19; Johnson, p. 6; Ramsden, p. 21). However, they also note that capacity to apply that learning within their positions is impacted by its relevance to practice, by

organizational affordances for the application of new learning, and by the degree to which they are positioned to engage in those affordances through the exercise of positional and individual agency. Exploration of affordances can be seen as the area in which the greatest synergy between organizational and agentic factors can be observed. As Billett (2011) notes, "the process of individual engagement in workplaces is premised on a relational interdependence between the individual and the social world" (p. 68).

Since the CRM curriculum is generalized across multiple museum and other cultural heritage settings, identifying situated applications is a critical step in transfer and one that seems influenced by the learner's capacity to perceive, plan for, and act upon an affordance.

> ...sometimes you're taking a course that you may not be ready to take, or sometimes you were taking a course at a time that there wasn't a major strategic direction that you were planning. …But you've got [it] in the plans for next year, so you've got knowledge ahead of time. There'd be a few things you could implement directly, tidy up a few things, implement a few procedures, but sometimes the bulk of it didn't get applied until later. The advantage of taking a course in that way...it's still in your head, it affects the way you plan. Now you're planning with a lot more knowledge. (Ramsden, p. 26)

When there is a match between new learning and opportunities for application, the results are rewarding. "The content actually helped get me excited about my work. I was able to learn new things, apply different techniques and knowledge while at work...it created more energy at work for me" (Johnson, p. 16). On the other hand, when perceptions of affordances are limited, learning—and likelihood of transfer—is described as more arduous. Ramsden, Johnson and Fougère all comment that required coursework on heritage conservation was initially challenging as they did not have a frame of references for its use, although both Ramsden and Fougère have gone on to make use of conservation principles in their work. Wilson laughs when she remarks that she hated the financial management component of a course since it pushed her to use math skills and learn concepts that are not pertinent to her work. "It's lucky I got through" (p. 17).

Affordances to apply newfound knowledge and skills immediately after learning are noted as influential in the effectiveness of transfer by a number of authors (Axtell et al., 1997; Broad, 2007; Curry et al., 1994; Tasse & Hrimech, 2003). This is the point at which both enthusiasm for a concept and recall of the procedures and skills are normally at their highest. As time passes and other priorities take precedence, the level of commitment to transfer is seen to decline, as does the learner's 'retentive capacity' (Szulanski, 1999). This is aligned with the

notion that near transfer tends to be easier than far transfer. Respondents in each case setting observe that when an affordance is both immediate and similar, transfer is straightforward. On the other hand, some reflect that time is needed to allow concepts to gel. "Sometimes…it's something you need to think about or watch to see how it's going to affect the museum" (Ramsden, p. 8). This might also involve considering how an idea might be adapted. "...very often you see case studies [that are] very specific to their organization, so you take the essence of what it is and then see how you can apply that to your institution because every institution is so very, very different" (Ramsden, p. 12). This is echoed by Johnson at HDM who reflects "I can't do [a transfer] right now, but maybe down the road when we get this or this happens, then I can apply it" She notes that, with the construction of a new collections vault, "now I can take things from [the collections] course because now I have a place to store this stuff properly" (p. 16).

Capacity to respond to affordances by virtue of learners' authority or locus of control also emerged as a variably influential factor across the museum settings, in keeping with Billet's (2011) observation that "opportunities to participate in and access support and guidance are distributed in ways that reflect workplace political and power relationships" (p. 66). At MHM, Ramsden, as Director, has the scope of control to implement a wide range of policies and practices gained through her coursework as long as they are suited to the internal workings of the museum. The other learners also note that they have the capacity to respond to affordances within the bounds of their immediate jobs, but are limited when they wish to move beyond their prescribed scope. As Fougère at FoL notes, "...community development and working with the community, that's not something that we can just go out and do ourselves…because of policies and practices that Parks Canada has in place" (p. 35). She needs to involve a planner and seek the approval of the Superintendent to move ahead on a self-initiated community project.

Similarity/ relevance to tasks

Even if a learner recognizes a timely affordance for transfer, the learning process involved in applying newfound knowledge is complicated by the degree to which learning is of immediate and practical utility or requires adaptation to meet the needs of the position. Despite the inherent challenge of measuring similarity (Haskell, 2001), multiple instances of near or "easy" (Johnson, p. 9) transfer were cited as learners made immediate use of learning that was similar to workplace practices and needs. Collections procedures and practices within museums

are cited as similar to those addressed in the classroom, and Wilson notes the immediate utility of some preventive conservation interventions in her work with totem poles.

Other accounts of transfer experiences suggest a continuum of increasingly complex subsequent learning as the gap between learned knowledge and skills and local needs grows—although learners are largely positive that knowledge gained through CRM can be adapted for use. Ramsden at MHM distinguishes between short-term workshops selected for their immediate relevance to workplace issues and processes, and the more conceptual learning she undertook through the Cultural Resource Management Program. "The long courses are more of a long-term investment. I don't view the workshops as being long-term investments...because [they address] a specific need" (p. 40). She goes on to express the likelihood of engaging in backward reading transfer based on adaptation of knowledge to meet unanticipated needs: "...there's always an eye on the future because we just don't know how things are going to change….You never know when you're going to need [knowledge]. It's all connected. It's really a question of whether it's an immediate or a long-term need" (p. 41).

The task of adapting generalized knowledge to local affordances seems somewhat influenced by the degree to which the museum is able to adhere to standardized practices. For example, while CRM learners study appropriate conditions for collections storage and exhibition, such "…policies and practices [are] unrealistic for a museum where you don't have the ideal conditions" (FoL, Fougère, p. 14). Transfer can involve considerable creative effort "because the reality is most museums don't deal with the pristine and ideal conditions…they talk about humidity, and I've got a bucket here that the rain is pouring into."

In another case, profoundly dissimilar values associated with conservation diminish the likelihood that learning will be transferred. Wilson, at GH, reflects that her conservation practice is challenging in that it balances directives relating to the use of insecticides from hereditary leaders that are not aligned with conservation interventions normally used in Parks Canada.

Linked with similarity is the notion of relevance (Colquitt et al., 2000). While a new practice may not be exactly similar to those in practice, if a learner perceives it to be relevant to needs, useful in the resolution of problems, appropriate within the organizational culture, and/or implementable within existing levels of expertise and resources, circumstances or problems, the task of linking it to affordances in the workplace is eased. Axtell et al. (1997) note that learners' "perceptions of the relevance and usefulness of the course and their motivation to transfer skills are key variables in determining the level of transfer…" (p. 209). At the MHM, for

example, new human resource management practices gained through coursework were perceived as timely and relevant. Since they did not conflict with established procedures, introduction did not require significant adaptation. Use has been sustained as immediate benefits are observable (Ramsden, p. 22). Conversely, at GH, Wilson's work with cultural heritage in situ, as well as her cultural view on the role of museums, impacted her sense of the relevance of museological practices within her work. She comments that she saw museums as:

> ...places for dead things—that's always been sort of the thought that I had had with it. Going and experiencing museums in Victoria and going to class with people who came from those institutions served to broaden my thoughts about museums...I enjoy museums a lot more than I used because I never bothered with them before. (p. 10)

This mindset and a lack of immediate affordances for application made coursework on traditional museum practices difficult. "Things like museums design and principles of conservation and those things in the museum stuff, I didn't pay much attention to because I didn't see that they would be something I could use in this job. The fact that they were core [requirements] was really hard" (p. 18). However, Wilson engaged in backward-reaching transfer when she later took responsibility for a collection, and observes:

> ...procedural stuff has helped a lot, and in designing things. I would say that it has been valuable. It has taken on a level in my head that it almost becomes automatic. I have learned it and it's there. When I need it, it comes forward and I use it. (p. 18)

Available resources

Even if all other factors are supportive of the implementation of new practices, the absence of resources is likely to inhibit learning and transfer, at least in the short term (Awoniyi et al., 2002; Clarke, 2002). As Ramsden notes, "it's the same all over the museum world…if you don't get an additional person…how are you going to accomplish a great idea?" (p. 5). At HDM, budget shortfalls are seen as the root cause of low support for continuing professional education. "I think in economic hard times those sorts of things are perceived as a luxury" (Designer, p. 13). In this environment it is challenging to advocate for new or improved practices. "I think the struggle we have with following [professional] guidelines is really budgetary for the most part here" (Johnson, p. 5). Johnson observes that while the HDM is supportive of ideas for innovative exhibitions and other projects, there is an expectation that goals can be met on tight, at times decreasing, resources, and she comments "that can be frustrating" (p. 28). Tight resources are also noted at FoL where the scale and complexity of the

site and its aging structures places considerable pressure on budgets. “Again, with the lack of space and the cost of putting up a brand new museologically-appropriate… structure, it would take millions and millions of dollars that we just don’t have. In a lot of cases, we’re very much like a small museum…we don’t have a lot of money to do things” (Fougère, p. 14).

From the smallest museum to the largest, time is also at a premium. For example, at HDM, the Preparator notes, “I occasionally try [to access training]. Unfortunately my schedule is incredibly busy with all these exhibit change-overs…it’s a huge amount of work. It’s kind of a daily scramble [and] things fall by the wayside” (p. 3). Busy schedules are also seen to inhibit engagement in learning activities at MHM. The Programmer observes that staff are unlikely to initiate learning activities because “they’re busy doing what they do already” (p. 4), and both the Program Manager and the Lead Aboriginal programmer reflect that since their children are grown, they can finally contemplate opportunities for CPE. Time specifically for transfer is also limited. “I think you can always implement things, it’s the [lack of] time. Some people are looking for things to be implemented immediately. Others take a more long-time view. Sometimes it can be implemented in an hour. Sometimes in two years” (Ramsden, p. 33).

In some cases, the time to experiment with new procedures was not available in a busy environment. Staff at HDM reflect that “our schedule doesn’t allow us to evolve ideas to their full potential…. I think we could really do it better justice if we had that time” (Johnson, p. 23). This is echoed by the VP. “The workload is so incredibly heavy. People are always having to assume different roles” (p. 3). Ramsden at MHM comments that lack of time to implement new concepts “…continues to frustrate me. Developing a collections plan always seems to be put aside as other projects take precedence. However, the seed has been planted” (p. 26). In several instances, transfer was not considered timely as other priorities took precedence. With specific reference to community engagement concepts at FoL, the need for a shift in organizational attitudes had to occur before this concept was regarded as appropriate (Fougère, p. 20).

While lack of funding and time emerged as obstacles to both acquisition and the introduction of new practices in all case settings, learners’ increased knowledge, their increased perception of affordances and their improved strategic skills contributed to their capacity to work around such problems. Johnson at HDM for examples notes that she has sought grants for conservation, based on newfound awareness of conservation needs and her capacity to argue for conservation interventions. Ramsden indicates that she is able to argue more convincingly for increased resources for heritage site management as a result of her coursework.

Reflections on climates for transfer in case settings

While multiple and interdependent factors variably shape organizational climates for transfer across the four case settings, none can be described as intentionally invitational settings for the transfer of learning from the Cultural Resource Management program. And none can be described as learning organizations since they show little evidence of being "skilled at creating, acquiring and transferring knowledge, and at modifying its behaviour to reflect new knowledge and insights" (Kirwan, 2009, citing Garvin 2003, p. 114).

The dynamics, of course, vary with the setting. One case offers no explicit organizational supports for learning or for transfer of any kind. Three of the four museums do espouse the benefits of learning for both practice and organizational development and put resources in place to facilitate some degree of CPE, although implementation is not systematic and there is little follow through to ensure transfer. In two cases, episodic training events provide a means of ensuring that all staff hold core management and policy skills through specialized in-house training, while in another case, employee-initiated professional development is largely perceived as a means of rewarding staff and building morale and organizational affiliation. In each case, learning is generally recognized as a beneficial activity even it if is not accorded high organizational or strategic priority and its benefit are not measured or maximized.

What is notable across all four cases is the lack of attention to the strategic and systematic development of new skills to meet current and future museological needs or to support staff development—along with the absence of organizational strategies to ensure that knowledge gained through CPE is implemented in meaningful ways. What is also notable across all settings is the degree to which organizational conditions, whether they are positive, benign, or even barren, rely on individual agency to animate transfer activity. This is consistent with Naquin and Baldwin's (2003) observation that, "given the dearth of active transfer interventions in organizations, we would submit that, where positive transfer has been observed, it has often been a function of highly motivated and learning-agile individuals succeeding in relatively unmanaged and unsupported transfer conditions" (p. 94).

This offers an explanation for why CRM graduates describe transfer in largely positive ways. Overall, transfer climates across the cases are positive due to museum commitments to service, innovation and creativity, but are benignly inattentive in providing systematic supports for learning for practice and for transfer. As such, these settings present few deliberate

obstacles to the introduction of new practices. Such contexts provide a climate in which the degree of agency exercised by individuals is highly influential in the likelihood of transfer.

Learners' Agency for Transfer

This section draws on data from Chapter 4 on learners' experiences of transfer in each case setting, along with new data associated with the question, "how does personal agency influence museum professionals' inclination to put new learning to work?" Just as each museum is described as a rich and inspiring setting for museum practice, so each interview reinforces the pleasure and satisfaction that participants find in their museum work. Separating organizations from workers is inherently difficult since organizations are social settings that can be seen as the sum total of the aspirations and characteristics of the people who work within them (Sessa & London, 2006). This interdependence is anticipated by transfer scholars who emphasize that work is a "duality comprising the affordances of workplaces and the engagement of workers" (Billett, 2010, p. 12). This chapter explores a range of factors associated with learners' agency that contribute to their engagement in learning, transfer and participation in the co-participative and relational processes of work.

In each museum, the abilities and motivations of learners, their capacity to integrate learning, their commitment to professional identity and standards of practice, their passion for work, and their inclination to take initiative in advocating for and introducing new practices, combine to build on—or work around—conditions in the museum's climate for transfer. While their success is tempered by their level of expertise, personal values and goals, and scope of influence, their agency emerges from this study as a consistently compelling and influential transfer dynamic within the context of museums that offer benign but largely unstrategic climates for learning transfer. Agency stands out as the critical determinant of transfer in every case setting, although the ways in which agency is exercised is shaped by context.

This key finding is aligned with the proposition offered by transfer scholars who write from a socio-cultural perspective that learners and workplaces exist in a "recursive and mutually constitutive relation to one another across time. Consequently our experiences of continuity and transformation across time and social situations are neither a function of the individual nor the situation, but rather of their relation" (Tuomi-Grohn & Engeström, 2003, p. 27). Billet (2008), whose extensive research focuses on learning within workplace settings, elaborates on this proposition by pointing out that:

> …studies of learning through the working life identify how workplaces' affordances—those that invite workers in particular ways to participate, access support and reward—are generated and projected…. Yet, personal agency, subjectivity, and intentionality also shape individuals' cognitive experience in ways that mediate how they construe, interpret, and construct what is afforded them in workplace settings. (pp. 232-233)

He goes on to state that "the relationship between the two…is negotiated and relational, rather than being equal or reciprocal" (p. 233) and is grounded in both personal and organizational histories. As he notes elsewhere, "individuals' engagement with work is held to be co-participative—an interaction between how the workplace affords participation and how individuals elect to participate in that social practice" (2002, p. 29). Each situation is seen to be unique, based on the individual's life history and, as people engage with and learn through work tasks, they not only learn, but "this constructive process also constitutes the active remaking and transformation of culturally derived practices that comprise paid work" (2008, p. 233).

The critical role of personal agency in transfer is embedded in Eraut's definition of transfer as "the learning process involved when a person learns to use previously acquired knowledge/skills/ competence/expertise in a new situation" (2004, p. 212). Clearly, while the museums in this study emerge as benignly supportive of learning but inattentive in providing supports to animate transfer, the people who work within them can be seen as playing a dominant role in facilitating what is described as a generally high degree of success in adapting new knowledge to meet the situated affordances in the workplace.

Figure 3 at the start of this chapter outlines the themes that guided research and continue to provide a useful analytic framework. This section explores the specific ways in which case study data align with these themes:

- Ability Factors
    - learning mastery
- Capacity Factors
    - positional autonomy
    - perception of affordances
- Motivational Factors
    - disposition
    - self-efficacy
    - personal and professional values and goals
    - autonomous motivation and initiative

- incentives, rewards, perceived benefits
- professional, job and/or organizational affiliation

As noted in Chapter 2, "Relevant Literatures and Themes," agency is comprised of multiple interdependent factors relating to ability, capacity and motivation that variably influence the likelihood that the individual will respond to transfer opportunities afforded in the workplace. In these settings, all four CRM graduates share a common passion for their cultural heritage practice and set high expectations of personal and professional accomplishment. While such characteristics are reported across the sector as a defining feature of the museum workforce (e.g., Bailey, 2006a; Weil, 1988), these four women stand out within their museum workplaces as particularly disposed to undertake learning and to seek ways in which it can be used to enhance practice. Descriptions of their approaches to their work suggest that they are exceptional within their case settings. For example, a colleague at MHM indicates that Ramsden's commitment to learning puts the museum "on the cutting edge of museum practice" (Programmer, p. 7), while Fougère's manager comments that although every employee has had similar opportunities for innovation, "because of that...wonderful personality of hers, she's picked that up much quicker than others" (p. 11). He observes that her CRM participation:

> ...gave her new ideas...when she finished the program she was floating. She had all this stuff she wanted to try and go forward with. That's a very positive thing. That's what you like to see all your employees do, but it's not possible for all employees. They don't have the basic kind of drive to do that. So it's not everybody that can come back from the training program and apply it and be successful. (p. 12)

Similar observations are offered at HDM, where Johnson's colleagues praise her energy and commitment to a high standard of practice. At Gwaii Haanas, Wilson's passion, vision, and dedication are cited by colleagues (e.g., Data Specialist, p. 11; Coordinator, p. 13; Presentation Specialist, p. 14) as influential in building knowledge and understanding of Haida heritage.

I begin this discussion of agency for transfer with this point because it seems reasonable to suggest that each of the CRM graduates' self-directed commitment to CPE, with relatively little organizational engagement in planning or goal-setting, pre-disposes them as 'agentic' in subsequent efforts to also make use of their learning. By identifying personal and professional goals for learning, by finding the resources and the time to engage in studies, and by engaging in learning activities that are variously described as "fascinating" (Fougère, p. 19), "transformational" (Johnson, p. 7; Ramsden, p. 21; Fougère, p. 20), "fun" (Johnson, p. 6) and "wonderful" (Wilson, p. 17), each of these learners exhibits somewhat similar characteristics

that position them to find ways to make learning meaningful in work contexts. At the same time, such characteristics set them apart from some colleagues who are less inclined to engage in continuous learning to improve practice, as noted by the FoL Conservator (p. 4); the FoL Researcher (p. 12); the Programmer at MHM (p. 4) and the VP at HDM (p. 18). This reinforces the contention in the literature that those who are self-directed in learning activities are also inclined to be agentic in transfer activities (Colquitt et al., 2000). Nevertheless, while each learner exhibits abilities, capacity and motivation for transfer, the nature of their agency varies across the four museum settings in terms of the mix of factors that shape their inclination to apply their learning and in terms of the organizational climate that they must negotiate.

Learners' ability factors

Ability factors that influence transfer, as noted in Chapter 2, include both cognitive ability and the degree to which the learner feels that that he or she has mastered the content in question. While my focus here is on mastery since this study did not explore cognitive ability, a brief reflection on the role of developmental stages seems timely. At the outset of my descriptions of these cases in Chapter 4, I noted that I arranged the cases by learners' levels of experience, based on the expectation that increasingly maturity within positions might offer insight on the role of developmental stage in transfer. As noted in each case, the four learners are at somewhat different developmental stages in terms of levels of work experience, professional expertise, age, and goals. And, based on their comments and the nature of their work, all are positioned on a continuum between proficient and expert, according to their experience and their comfort with the task on hand. It is interesting that links between ability and development stage as it relates to transfer cannot be consistently tracked in this study.

Interviews offered a range of interesting reflections on ways in which growing maturity in the job and growing confidence in knowledge gained through studies and through on-the-job experience impacts ability, capacity and motivation for transfer. For example, at FoL, Fougère comments that "...trust grew over the years" (p. 2) along with confidence that her knowledge enhanced her ability to contribute at the organizational level (p. 29). Johnson and her supervisor at HDM also observe that increasing maturity in the job allows her to advocate more openly for best practices (VP, p. 16; Johnson, p. 15). At MHM, the Executive Director states that:

> I think people reach a mature point in understanding and appreciation of the world, where they don't feel threatened by others. I think that comes from the knowledge and skill and confidence and understanding of the role of community. (p. 10)

He goes on to observe that Ramsden's experience and expertise enable her to take a strategic approach to the introduction of new practices (p. 13). Ramsden also notes that she has become more confident and insightful over time. For example, in preparing grant applications to support learning activities, she notes that "I can see that how…knowledge is going to be useful and applied much more relevantly than I could at the beginning" (p. 26). A particular area in which maturity/expertise seems to enhance agency is the degree to which the learner makes use of strategic knowledge and skills to reflect and act on their personal ability to champion new practices and to recognize the strategies needed to negotiate climate in advocating for new practices. As Ramsden notes, she now introduces new concepts in a cautious manner:

> I'll talk with staff about an idea so everybody [offers] feedback and then we go backwards and forwards. …Other times it's something that you put on the back-burner. It's there and you know you can bring it back when you start talking about projects. ...That's how ideas come in.... They don't need to come straight from a learning place to the museum. (p. 41)

Many other observations associated with the influence of maturity on transfer are threaded through the following sections. However, this study does not reveal distinctive patterns that specifically link learners' developmental stage to transfer. Whether this is because data collection was not structured to probe this or because developmental factors are not widely addressed in the literature and therefore under-recognized in my understanding and analysis, this points to an interesting avenue for further research.

Learners' mastery of content

Mastery—or learners' ability to find meaning in the content of coursework, relate it to practice, and develop the confidence to act upon it within their workplaces (Cree & Macaulay, 2000)—emerges in each cases as influential in transfer, particularly as it is linked with learners' prior experience and ability to contextualize new learning within the framework of practice. As Johnson at HDM comments, her appreciation of specialized museum discourses and practices "...did come out of the coursework a lot more. I think it would take me a lot more years of work to learn all that without the course" (p. 19).

In each case setting, respondents provide examples of the ways in which they subjectively construe and construct knowledge for practice by integrating learned content with prior knowledge and interpreted it within the situated needs of the workplace. Ramsden, for example, describes taking a course on wood conservation that, on first consideration, was not

expected to be applicable in practice. However, she remarks that as a textile conservator she has worked with cotton fibre: "...we were talking about wood and cellulose, so it was a strange transfer of knowledge. Organic chemistry suddenly started to come out again. Who would have thought there would have been that linkage?" (p. 39). Similar experiences are noted by Fougère who remarks that her understanding of the physical condition of heritage structures is specifically interpreted in terms of the internal environments they create for the care of artefacts. Wilson, in learning about the care of wooden objects and structures, assessed these principles in the context of Haida norms for the conservation of totem poles. Rather than adhering to strategies to prolong the life of these materials, she favours strategies to preserve the skills and knowledge that shaped them. While each CRM graduate mastered similar concepts relating to the conservation of wooden objects, their uses were dissimilar in practice and involved varied forms of adaptation to make them meaningful.

Accounts of learning and transfer in the four settings illustrate that different 'types' of knowledge (de Jong & Ferguson-Hessler, 1996) have been considered, mastered and used in different ways. For example, most respondents observe the degree to which new 'conceptual' knowledge enhances their ability to utilize theoretical frameworks to recognize and respond to affordances and advocate for varied practices. The Curator at FoL remarks on the importance of theory combined with experience as basis for understanding professional roles. "If you don't have at least some of the theoretical background…experience alone is not going to take you where you should be going. …I'm not saying experience is bad, but without some theory I think it's not as strong" (Curator, p. 2). This is echoed by Ramsden at MHM who observes that "when you learn on the job, you learn a huge amount, but sometimes you don't get the theory that you need" (p. 9). She adds that she found her CRM coursework fascinating. "It was really interesting to find out why we do things...it's nice to have the theory and a little bit more understanding of why we do things a certain way and that was part of [my] need for new knowledge."

While conceptual knowledge is generally recognized as useful for its explanatory powers, respondents also note that it is challenging to absorb and relate to practice. Ramsden comments that she is the type of person who doesn't fully understand concepts unless she understands the context. "I've always been a much more concrete than an abstract person" (p. 21). However, once she has mastered the fit of a theoretical framework such as an approach to values-based conservation decision-making, "I can use this framework, and now I can bring in all

sorts of other things.... I can only become abstract in some of my thinking if I have a really concrete foundation" (p. 21). Johnson expresses a similar concern:

> Theory has always been difficult. It takes me a long time to comprehend it.... I have to apply it and then come back.... What I'm doing daily in my job—that's the easy part for me, but I need to be doing it to come back to go "oh, now that makes sense." (p. 9)

She comments that theory presented in her undergraduate courses did not become meaningful until she had a workplace in which it could be evaluated. "I didn't have enough experience out there to apply [it], and I didn't do well in it. ...I think now that I have so much more [experience] the paper [theory] is making sense" (p. 10). Ramsden comments that "at the beginning ...you take courses in a general way, and gradually you start to [say] 'that's relevant to that' and you start to slot [learning] in where it needs to go." This observation highlights the ways in which the individual and workplace are co-participative in making learning meaningful, as noted by Billett (2011) who comments that, just as the workplace "requires individuals' agency to actively remake and transform its practices," the individual needs "the social world to provide access to knowledge that is sourced in its history [and] cultural practices..." (p. 61).

Even when a learner is comfortable with conceptual knowledge, capacity to put it to use is influenced by the learner's perceptions of affordances. Fougère notes that while she likes theory, "sometimes you can't always put theory into practice because of timing..., or because of policy that you can't do it that way. You have to go an around-about way, or look at how theory from the course and the theory of Parks Canada policies co-exist" (p. 34).

Generalized 'procedural' knowledge—or the routinized and sanctioned work tasks that tend to be articulated as best practices in the classroom—is also noted as valuable as well as adaptable within these museum settings. For example, respondents comment on the value of case studies since they demonstrate how other organizations have approached a new practice and offer useful stories that build others' support for transfer initiatives. Fougère uses case studies in planning a community initiative. She reflects "that's good stuff because these were cases that actually happened. It wasn't just a theoretical thing. These were things that actually happened to other communities...so that really changed me" (p. 19). Ramsden and Johnson also note the value of cases in stimulating thinking about how learning might be applied.

Mastery of procedural knowledge also provides tools that help organize and approach work in ways that support transfer. Wilson, for example, notes that her ability to undertake research projects is much stronger as a result of coursework. The Presentation Specialist

remarks that "it gave her a discipline and I think it's something that she has been able to work on and improve" (p. 14). Wilson also praises strategic planning skills that she gained in a CRM management course as tools that she applies repeatedly in professional and community work.

Mastery of codified conceptual and procedural knowledges at the competent or proficient levels (Eraut, 2004) also contributes to clear and authoritative communications in these settings. The Curator at FoL notes that after completing the introductory CRM museum studies course in the distance format, he was able to engage in professional discourse with a conservator in the regional service centre. The conservator "...stopped in the middle of the conversation and said 'I only have one question—where did you learn to talk like this?' I learned to talk like this from the University of Victoria distance learning program" (p. 2). Content mastery is noted by others as influential in advancing ideas. Fougère comments that "having the comfort of knowledge…really lets me have input into what's going on here at work" (p. 34).

Colleagues' perceptions of learners' mastery of conceptual and procedural knowledge also build confidence that the learner has a solid foundation and credibility in leading transfer processes. At MHM, a colleague of Ramsden notes that "I think what the program did for her was give her a more well-rounded idea of museums. She knows her stuff" (Program Manager, p. 9), while her supervisor observes that "she has clearly established herself as an expert. That does us an enormous amount of good. ...The fact that we are a repository of such skill and knowledge is doing nothing but good things for our reputation" (ED, p. 9). Ramsden's perceived expertise "focuses everybody's attention" (ED, p. 5).

As learners' perceived ability grows, expectations also grow. At HDM, a colleague reflects that Johnson was promoted to exhibitions on the basis of her growing ability."She's very bright, so the training that she has had in other areas translates to [exhibits]" (Designer, p. 11). In such circumstances, colleagues may not have a clear sense of what the learner has gained through coursework. Wilson at Haida Gwaii reflects "I think they thought that I was going to be able to do everything that a CRM crew could do," and adds that this includes the work of "historians, archivists, archaeologists, anthropologists, conservators...[and] curators. They thought I could do all those things" (p. 22). She comments that her perceived mastery of such diverse specializations as a result of graduating from the CRM program has gained her respect, but also tends to create unreasonable expectations, particularly around the volume and scope of work. Given that supervisors across all four case settings take a hands-off approach to

planning for and debriefing around coursework, their understanding of learners' evolving knowledge and skills is not strongly developed.

Respondents in each case comment that conceptual and procedural knowledges gained in the classroom contribute to a better understanding of the 'situational' case-specific, often tacit, knowledge and practices that they work with day-to-day. The Curator at FoL, for example, notes that his capacity to understand his Parks Canada practice as part of a larger professional enterprise was enhanced by course participation. This is echoed at Gwaii Haanas where Wilson comments that opportunities to learn conceptual and procedural knowledge and skills were most meaningful in confirming that traditional and situated knowledges were appropriate for her practice. She comments that she sought to legitimize her existing knowledge "...because I had never gone to University before and [CRM] was a new field…I think that I looked for validation with the stuff I was doing on the ground. For me that was really good" (p. 17).

As new concepts and procedures are added to a learners' toolbox, these can also pose dilemmas when they are at odds with ingrained and value-laden skills. Ramsden, for example, discusses challenge she encounters in making collections accessible: "All our best practices are so weighted...it's that level of discomfort between us being professionals and keeping the collections safe...and finding ways of them going out [into the community]. I'm not quite sure how to do this" (p. 16). Dilemmas are also experienced by Wilson, whose Haida values are not always aligned with mainstream approaches to caring for cultural heritage. She reflects that:

> It's just a different way of looking at things I guess. Terminology, calling articles in our life, [that] our ancestors used...artefacts. They're day-to-day artides for us. So that bothers me. Referring to village sites as archaeological sites—you know they're village sites to us. I feel that the terminology distances people and makes it easier for people who aren't part of the culture to work with the stuff, whereas for me, it's very personal. It's part of who I am…. So that sort of feeds through everything we do. It's not easy at times. When I've had to deal with human remains, I couldn't do it, couldn't do it. …I mean it bothers me. It bothers me that they would say "we found some human remains…" I couldn't do anything about it. (p. 16)

In such circumstances, it is evident that learners experience motivational challenges in mastering and applying concepts that are at odds with their values and prior experience.

The development and use of 'strategic' skills and knowledge in transfer is a theme that threads through all case settings. The mastery of self-directed approaches to planning, critical analysis, positive social relations, and problem-solving for are not generally highlighted as a key outcomes of the CRM curriculum, nor are they the explicit subject of transfer activity.

Nevertheless, their influence can be detected within many accounts of transfer as a critical factor in negotiating transfer processes. Fougère's discussion of her efforts to apply concepts from her *Building Community Relations* course, for example, highlights how her recognition of timing issues, policy constraints, relationship protocols, and her own strengths and needs for further development influenced the initiation of a project over an extended period.

> I knew that that [FoL] wasn't there yet, so I had learned about [community engagement] and thought "okay" and just sort of put it to the back of my mind, because there were other areas to concentrate on, and then as circumstances changed, you find yourself taking skills and using them for different scenarios. It's not frustrating. (p. 20)

Strategic knowledge and skills are also evident in Ramsden's recognition that it is important to build support for new concepts rather than to force them onto colleagues. She comments that there is a fine line between "coming back all enthusiastic and telling everybody about something—they're always interested—and coming back with a hundred new ideas and saying 'okay, we're going to do this'—you see the look of horror on their faces" (p. 8). She adds that "I've become a lot more pragmatic—it's really about the end goal" (p. 34). The ED of the Foundation that runs MHM observes that Ramsden brings important strategic skills to transfer.

> The challenge is to use your learning without it being obvious…. I think one of the great advantages of [Ramsden] is that she's a mature student so she's not fresh-faced, fresh out of school, [saying] "stand out of my way." She understands the value of what she has learned, and also understands that the implementation is as important as anything. You can go about this in so many different ways. I think the maturity of her thinking at this point in her career has a lot to do with how successful she can be. [Her colleagues] really do look to her as a mentor, guide and not as a boss. (p. 13)

At HDM, Johnson's capacity to strategically negotiate the involvement of others in her curatorial project is observed by colleagues. In her first "nerve-wracking" (p. 8) curatorial project, Johnson drew on strategic skills to coordinate a complex range of tasks, to the degree that one colleague remarks that she "is by far the best curator I've worked with" (Preparator, p. 12). And Wilson, who indicates that she is challenged to point out specific instances of transfer, provides evidence that she acquired strategic skills as an outcome of her studies and is integrating them in her practice.

> I think that I had a lot of the skills, but I didn't have them in a step-by-step form that I could use. So [CRM] gave me some skeletons if you wish to hang things on and make sense of what I was trying to do, or what I'm doing. So there was value, lots of value, lots of value. (p. 30)

It is interesting to note that each learner remarks that it takes time to build comfort in mastering content, perceiving affordances, adapting and applying new ideas. Wilson, for example, notes that "timing is everything. I think that I use [new concepts] over time" (p. 20). She also reflects that as new learning becomes integrated with existing knowledge, her capacity to distinguish it from other knowledge and reflect on its specific transferability diminishes.

> It has taken on a level in my head that it almost becomes automatic. I have learned it and it's there. When I need it, it comes forward and I use it. I don't think "oh yeah, this is what I learned at University. It's just a part of who I am now." (p. 18)

Integration of learning to the point that it is embedded in consciousness is also noted at other sites. Johnson, for example, states that her learning is "always there" (p. 30) while Fougère comments that learning in one area influences her perspective in others: "these are resonating impacts that just keep going on" (p. 14). As noted earlier, she also emphasizes that new learning "creeps in everyday…" (p. 24). Integrating new learning with old to a point that it is comfortable to draw on is seen to involve repeated experiences to build mastery, leading to "intuitive grasp of situations based on deep tacit understanding" (Eraut, 1994, p. 124).

A notable outcome of CRM studies that arises across the four settings is the degree to which mastery of content enables learners to move outside their job responsibilities. Boundary crossing, while described as stimulating in the various cases, is seen to be challenging in transfer processes as it involves adapting knowledge in unfamiliar situations and negotiating potentially arduous social relations (Tuomi-Grohn & Engeström, 2003). By completing a comprehensive museum studies program involving both required and elective courses that exposed learners to content beyond the normal confines of their specialized positions, each noted an enhanced ability to relate their current position to the larger concerns of the museum, and to take a more integrated approach in new practices. Johnson, for example notes that her collections management knowledge and was useful in a curatorial process. "I didn't need to bring anyone in to do that, whereas a lot of curators would want to bring in a collections manager. That was nice. I was able to take that knowledge from my experience and the courses" (p. 8).

Ability to move across boundaries of knowledge and practice is also noted by Ramsden whose coursework in heritage conservation enabled her to assume responsibility for municipal historic sites effectively. Fougère, whose coursework in public programming led to a leadership role in culinary programming, is observed to be "so far beyond her job description that...people [are] very happy to kind of sit back and let [her] do tons and tons of work..." (Researcher, p. 15).

And Wilson's coursework has enabled her to extend the scope of her involvement in both cultural and natural conservation tasks over time and prompted expectations that she could assume a broader cultural resource management role in Gwaii Haanas.

Summary

The degree to which learners are able to engage with varied kinds of conceptual, procedural, situated and strategic content offered in the CRM program, integrate it with prior knowledge, relate it to their practice, adapt it for use, and/or retrieve it as affordance for use arise, is clearly influential in their agency for transfer. This discussion of mastery of content reveals the subjectivities inherent in learning transfer processes. These case studies reinforce observations in the literature, as summarized by Billett (2011), that:

These active and negotiated processes of learning and remaking culture are not mere enactments of knowledge sourced elsewhere. Instead, of necessity, individuals' engagement with and construction of those practices is premised on the agency of individuals' construing, negotiating and remaking the practices of work, which is premised in their subjectivities and mediated by the exercise of social and cultural norms and practices. (p. 62)Learners' capacity factors

Capacity factors are those external factors that enable the learner to exercise agency within their positions and organizations. It is in this area that interdependence with organizational factors is most noticeable as the museum sets a context for individual action. The differences in size, purpose, resources and external controls that characterize the four case settings are therefore influential in the capacity that the learner has to exercise agency in transfer activity.

Positional autonomy

As noted, organizational chains of command, the structure of work, and the nature of practical responsibilities and relations influence learners' capacity and scope of control to exercise autonomy in identifying and applying new practices. Axtell et al. (1997) also note that "autonomy at work is only likely to be beneficial when employees have achieved a certain level of competence" (p. 211). Learners' responses to the brief "Survey 1: Degree of Autonomy in Approaches to Work, Learning and Transfer" (Appendix C) were helpful in identifying patterns across the four case settings:**Survey 1: Degree of Autonomy in Approaches to Work**, Learning and Transfer

"Autonomous workers are not normally required to follow set procedures; are not closely supervised in their performance; decide for themselves how to operate for some or all tasks;

and decide whether and when to apply new knowledge to their performance" (Broad, 2005). Using this definition, learners indicated their perceived level of autonomy in day-to-day work:

How much autonomy do you have…	**No autonomy:** All decisions made by supervisor(s)	**Low:** I play a minor role in decisions	**Moderate:** I make some decisions, but many are made for me	**Considerable:** I frequently make decisions in this area	**Total autonomy:** I am the sole decision-maker
…in defining the ways you approach your day-to-day work?			**Johnson**, HDM in exhibitions	**Fougère**, FoL **Johnson**, HDM collections **Wilson**, GH	**Ramsden**, MHM
…in identifying emergent knowledge and skills associated with your specific job?			**Johnson**, HDM in exhibitions	**Fougère**, FoL **Wilson**, GH	**Johnson**, HDM collections **Ramsden**, MHM
…in identifying emergent knowledge and skills that enhance programs and services?		**Johnson**, HDM **Wilson**, GH	**Fougère**, FoL		**Ramsden**, MHM
…in participating in professional development?		**Fougère**, FoL **Wilson**, GH	**Johnson**, HDM		**Ramsden**, MHM
…in introducing new practices that impact my own approaches to my work?			**Fougère**, FoL **Johnson**, HDM in exhibitions	**Wilson**, GH	**Johnson**, HDM in collections **Ramsden**, MHM
…in introducing new practices that impact the work of others? no response Fougère		**Johnson**, HDM, in exhibitions	**Wilson**, GH	**Johnson**, HDM in collections	**Ramsden**, MHM
…in introducing new knowledge and practices that impact organizational services and goals?		**Fougère**, FoL **Johnson**, HDM **Wilson**, GH			**Ramsden**, MHM
…in monitoring and implementation of learning?		**Johnson**, HDM, in exhibitions	**Fougère**, FoL **Johnson**, HDM in collections	**Wilson**, GH	**Ramsden**, MHM

Table 11. Survey of autonomy in case settings

This table indicates that each respondent has a somewhat different level of autonomy in each of the eight aspects, based on the nature of the museum and the design of their position.

Ramsden shows the highest and most consistent level of autonomy in her senior management role in a small and collegial setting. Johnson also reports a relatively high degree of positional autonomy, but makes a distinction between her work with collections and her more team-based work with exhibitions. Both these respondents have the greatest scope in introducing new practices within the context of their day-to-day work. Wilson and Fougère, working within Parks Canada, also have a considerable degree of autonomy in day-to-day work and in determining the skills needed for practice, but report low capacity to influence knowledge and practices at the broad and extensively regulated organizational level. They also note, surprisingly, that others tend to direct their participation in continuing education. It seems likely that this response is linked to the need for others to approve funding and leave time for participation.

The influences of organizational size, complexity, remotely articulated policy, and supervisory styles impact positional autonomy in the Parks Canada settings. Unlike MHM for example, where curatorial and programming staff work directly with community in many areas, Fougère notes that she can exercise control within her collections position, but that:

> ...bigger things like community development and working with the community, that's not something that we can just go out and do ourselves. We need participation because of the policies and practices that Parks Canada has in place. We don't have the authority to do that. (p. 35)

While positions afford varying degrees of autonomy, individuals must also exercise agency in acting upon affordances. At FoL, the CRMU manager notes that Fougère could easily have continued to work within the boundaries of her long-standing collections position. It was her agency in pushing those boundaries that initially involved her in the historic chocolate research that, in turn, involved her in the culinary project.

This study offers considerable evidence that museum workers' level of autonomy is influential in their capacity to effect transfer. This is aligned with Axtell et al.'s (1997) finding that "those who have control over the way they work may find they can create more opportunities to use new skills than those who have less autonomy in their jobs ... being free to create these opportunities may be critical to the sustained application of trained skills" (p. 210).

Perceptions of affordances

As noted, this is one of the most interdependent areas of transfer in that, while the organization must provide affordances for the application of learning, the learner must perceive and act upon them. These cases provide descriptions of numerous instances in which

coursework enabled learners to identify unanticipated opportunities for the application of their learning. Beyond recognizing potential affordances, these cases also offer many instances in which it was necessary for the learner to create appropriate conditions for action in order to respond to affordances.

Enhanced perception of affordances is evident in observations that CRM graduates gained a deeper, more nuanced view of the purpose and tasks involved in their work as they engaged in CRM studies. As the Curator at FoL notes, Fougère does not "need explanations any more about why we want to do it this way or this should be the end result" (p. 14). Fougère's coursework is also recognized as instrumental in opening her eyes to emergent approaches to programming practice that are not being embraced by colleagues. "She could see where there were vacancies, gaps, things that could be filled in there, based on her increased understanding of public programming" (p. 14). A factor in Fougère's process of perceiving these affordances was also recognizing that the Fortress was receptive to new approaches to visitor engagement due to both the corporate commitment in this area and local management's support of personal innovation. As her Manager observes, employees like Fougère "always find the way to be creative. They find a way to make things work. They achieve their goals" (p. 11). He emphasizes that Fougère is one of those "... wonderful people that can achieve her goals, whether she's a curator, whether she's in product development, whether she's head of the culinary program" (p. 11). He adds that while staff at FoL are encouraged to be innovative "she's picked that up much quicker than others" and comments that management supports her boundary-crossing efforts in this area since they recognize that she brings new perspectives and skills to the organization.

Enhanced capacity to perceive affordances is also observed at HDM, where Johnson notes that she initiated conservation and curatorial projects after she completed associated courses. Ramsden at MHM also comments that courses that were not expected to be relevant to her work opened her eyes to new approaches and initiatives that expanded her role with heritage sites. She also notes that when she is unable to perceive an affordance, she likes to analyze the reasons why a concept or procedure is unworkable in her setting.

Perception of affordances is also enhanced through acquisition of strategic skills that encourage self-reflection. Fougère comments that as she moved through coursework she developed her capacity to adapt concepts. "Okay, I can't apply that, but hey, if I take that idea and put it over here, then I can apply that principle." So those courses really did give me a foundation..." (p. 15).

The transfer experiences that Wilson describes differ somewhat in terms of perception of affordances. Given her strong commitment to Haida approaches to conservation and stewardship, she reports that much of the content of courses was dissimilar to her situated needs. Not only were few affordances provided within her work on Haida heritage, her capacity to recognize them may have been limited by the perceived relevance of her learning.

Axtell's (1997) finding that perceived relevance is critical in transfer is pertinent in every case, as is the observation that unless a learner has the capacity to recognize an opportunity for transfer, the use of new learning is unlikely to happen. Learners' motivational factors

In addition to exhibiting both the ability and capacity to make CRM content meaningful in the workplace, participants in this study also demonstrate the importance of motivation in acting upon affordances for transfer. Dispositional characteristics, self-efficacy, values and goals, initiative, and professional identity all emerge as influential in shaping agency for transfer.

Learners' disposition

As noted, all four CRM graduates stand out within their workplaces as professionals who set high standards and expectations for effective practice. Scholars discuss five dimensions of disposition including conscientiousness, emotional stability, openness to experience, extraversion and agreeableness as influential in learning transfer (Herold et al., 2004). Observations of these characteristics in the case settings are considered here.

Conscientiousness, defined as "the extent to which someone is dependable, persevering, hardworking, disciplined, deliberate and achievement oriented" (Herold et al., 2004, p. 854), and seen as positively related to learning and transfer (Colquitt et al., 2000), is a recognizable characteristic among all four CRM graduates. Some note these qualities as they describe their own approaches to work. Fougère, for example, comments that she likes to know everything about a topic "...so that I can do the best that I can. I have a lot of energy. If I put my energy into one spot, I'll say 'how many ways can I look at this project?'" (p. 8). Colleagues also observe strong conscientiousness and persistence. "She's an unstoppable force..." (Curator, p. 16); "She is go, go, go, go, go..." (Manager, p. 11). "She is a go-getter" (Conservator, p. 12).

The qualities of conscientiousness are also observed in other CRM graduates. Wilson "...gets things done...when she sees something on the horizon, she sticks with it, although there may be a lot of turns and corners. She sees something and sticks with it (Data Specialist, p. 11). And Johnson "really does try to bring the museum to a higher standard" (VP, HDM, p. 16).

Openness to experience is also noted across the study group. This characteristic, which is indicative of curiosity, intellect, a willingness to explore new things and the capacity to adapt, is also positively related to learning and transfer (Herold et al., 2004). Ramsden, for example, indicates that she is "a lifelong lover of learning" (p. 8) with an "insatiable appetite to learn more and read more and understand more" (p. 9). While she is clear that much of her learning is explicitly linked to professional growth, she also notes that learning is, at times, driven by curiosity and is of benefit even when not directly related to practice.

> I'm one of those people who also does things just because I think it's fun. I don't want to only do things I think are applicable to where I am today, because then I'll never venture into other areas and I'll never feel comfortable in that. (p. 26)

Fougère at FoL also emphasizes her openness to new ideas and museum practices, saying "Wow, this is an incredible world. I really do want to know more" (p. 18). Similar curiosity and openness is expressed by Johnson. Wilson, on the other hand, describes initial challenges in being open to new experiences due to early difficulties in school settings and to her emphasis on Haida ways of knowing and doing. She comments that a supervisor told her that colleagues did not want to work with her because she was bossy. "So I thought 'okay, I'm going to do something about it.' I went and dealt with a lot of my issues and over the past probably twenty years I've slowly changed some of it" (p. 8).

> Over those years, in between 1980 and 1996, I had started going to counselling and trying to sort out my life. [Going to UVic] was kind of the cream, this was the icing, to prove to myself that I could do things, that I didn't have to avoid…because my whole life was about not being responsible. It still comes through. It's one of the hardest things I've been able to overcome, is that…I can't do it, I'll just ignore it, it will go away, I can't do it. Even when I know I could, somewhere inside of me I always knew I was brilliant, but I was so afraid of being proven wrong, that I proved it wrong. (pp. 23-24)

She indicates that she has overcome many personal obstacles. "It was a combination of me going to school, looking for direction, trying to put my life straight, and all that. I think that it helped me grow up" (p. 23). This makes a difference in how she approaches her work. "A lot of people talk to me about the changes they've seen in me and most of them are good" (p. 8). While she perceives that a primary benefit of CRM participation was reinforcing existing knowledge, she is more open to others' perspectives. "I work very hard at being not quite so forceful and instead of telling people, asking" (p. 31).

Emotional stability, characterized by a level of comfort with a task—or an absence of anxiety in tackling new tasks—is somewhat harder to gauge within the group, although

observations from colleagues indicate that this quality is present. For example, Johnson's colleague indicates that she exhibits "grace under pressure" in balancing multiple demands in the workplace. When faced with a challenge, she will say "okay, we'll figure it out, we'll do this" (Curator, p. 12), and Fougère's colleague comments that she is a "very confident, outgoing person" (Researcher, p. 12) while her manager says that "she moves forward, she keeps going, that's her personality. That's who you're looking for as an employee, …it's easier to bring somebody back than to push them forward, and she has the quality of being able to go forward" (p. 11). Such emotional stability is linked with self-efficacy and contributes to individual's decisions to "exert and maintain effort" (Herold et al., 2004, p. 856) in learning and transfer.

Extraversion and agreeableness also emerged as common characteristics across this group. Johnson is described as "a real cheerleader" (VP, p. 16) in her efforts to advocate for effective practice, and her supervisor speculates that this quality is further enhanced by her studies. Another colleague notes that "she's a stand-up person" (Preparator, p. 12) and comments that just as Johnson supports his work, he in turn "will work hard and be loyal." At Fortress of Louisbourg, colleagues note that Fougère is "high energy, she's creative, she's witty, she has fun in her workplace (Manager, p. 11), while at Haida Gwaii, Wilson is described as an approachable and eloquent speaker for her people (Coordinator, p. 13). The early interpersonal difficulties that Wilson identified seem to have been resolved as colleagues express affection and admiration in their reflections on their relationships with her. It seems evident that being extroverted encourages others to support these learners' efforts to implement new practices.

Overall, there is considerable evidence that the CRM graduates from HDM, MHM and FoL exhibit dispositions for transfer by virtue of their conscientiousness, their interest in engaging in new experiences, and their energy and commitment. Wilson at GH describes more complex dispositional dynamics that can be seen to impact her transfer experiences. While she demonstrates notable conscientiousness in advocating for the stewardship of Haida heritage and in defining and pursuing her generalized learning needs, and while she is admired by her colleagues, her descriptions of early emotional challenges in approaching learning with confidence and in recognizing the fit of concepts which are not aligned with her worldview and job needs, suggest limited openness to new experiences. This may have inhibited some transfer opportunities by masking her perception of and/or willingness to respond to affordances.

As noted above under Positional Factors, the creativity inherent in work design emerges as an influential factor in transfer in these case settings. I observed that aspects of museum

work require creativity and accord the worker considerable autonomy in arriving at imaginative solutions to exhibition, curatorial and management challenges. However, it is interesting to note that an individual's disposition for creativity is not noted an aspect of agency in the literature of workplace learning. In these museum settings, learner's intrinsic creativity is noted by colleagues. At FoL for example, Fougère's Manager says "because of her personality and her desire to move on and do creative things, she…chose to go to the program that you offer and when she came back from there that was like throwing fuel on the fire" (p. 12). At HDM, Johnson is praised for her curiosity and inventiveness. She also notes that she and her colleagues "get great ideas" (p. 32). It would be interesting to explore the considerable literature on creativity to further develop an understanding of its role in transfer in these case settings and in the museum sector more generally.

Learners' self-efficacy

While each learner demonstrates some degree of self-efficacy in initiating and engaging in learning processes, all comment that involvement in the CRM program has contributed in important ways to the further development of the confidence with which they approach their work and the application of what they have learned. This echoes findings (Axtell et al., 1997; Clarke, 2002) that post-training efficacy is influential in applying new knowledge. This confidence appears to have several dimensions. Confidence in understanding content and its relevance to practice is one dimension. This quality has been highlighted as a signifier of mastery and is explored above in 'Learners' Mastery of Content.'

Another dimension is confidence that new knowledge provides an adaptable foundation for situated approaches to work. This, in turn, enhances perception of affordances. As Ramsden notes, participation in CRM:

> …has allowed me to have a very varied portfolio and to feel confident with that varied portfolio. I think that's one of the biggest things. My daily work is museums, heritage, all sorts of things and I couldn't have done that without a program that allowed me to pick the courses that I needed to do. …One of the great advantages to me was that [I was] able build [my] own program, and my role and my job changed and it gave me the flexibility to continue to change and build what I needed to learn. (p. 10)

Johnson at HDM indicates that growing experience, combined with her coursework makes her "a little more mouthy, a little more confident I guess. I will take a stand for not only my personal ethics but for museum ethics and collections" (p. 15). She adds "because I have the

background knowledge, people will go "oh yeah, you know you're right." I think I wouldn't have done that a few years ago." Fougère at FoL also reflects that growing knowledge contributes to confidence in implementing new practices. "My level of confidence and ability has gone up because of the foundation of the knowledge that I've gained and also the experience" (p. 29). This is observed by a colleague who notes that she "is a very confident, outgoing person anyway. She's always had brilliant ideas… but she sort of blossomed…. [CRM] gave her confidence in what she was saying" (Conservator, p. 12).

Growing confidence in Wilson's practice is also attributed to CRM participation. "[She] has always been overconfident (laughter) but definitely, yes, more confident in doing [research]" (Data Specialist, p. 10). The Presentation Specialist notes that CRM "seemed to give her focus in terms of…trying to reclaim and refocus her knowledge…I've seen her become this really powerful knowledge-holder [with a] commitment to getting out into her community and making sure that other young people do it" (p. 13).

And finally, capacity to negotiate workplace relations to advocate for new practices in appropriate ways is another dimension of self-efficacy gained through study. As Ramsden states:

> I feel confident to bring new ideas into the workplace once I have thought them through and once I'm comfortable with the idea. I don't feel as confident if I'm trying to introduce an idea that I really haven't got to grips with myself, because I feel that leaves me…a little exposed. I like to be able to think the idea through and have quite a few of the answers already so that when you try to introduce it you've thought it out well, you've thought of the process, you've tried to guess some of the resistance that could happen, and you've tried to think how you're going to get something through which may not be comfortable with other people. So once I've worked all that through, then I'm happier to say okay, let's start moving forward. (p. 28)

This confidence translates to increased respect and involvement in the workplace, which, in turn, further strengthens capacity to advocate for new practices. At FoL, Fougère reflects that she is increasingly involved in organizational planning and can offer new insight to this process. At GH, a colleague reflects that Wilson has been accorded greater respect as a result of her studies which, in turn strengthens her ability and motivation to advocate for specialized cultural resource management approaches.

> She was definitely energized by the opportunity to go [to CRM courses] and she gained a lot of confidence that she did have the skills, even though they weren't previously formally recognized. Now she had the formal credentials to say that "yes, she has the capacity to do that job," and to be recognized as a professional in that job. So perception by her supervisor and by her peers changed, because she made the

> commitment to go back to school. That in itself is a big thing, 'specially when you're not a spring chicken any more. (Coordinator, p. 13)

Learners' values, goals and rewards

Participants' comments also indicate that agency is shaped, to a considerable degree, by values, goals and intrinsic—and occasionally extrinsic—rewards. Just as their institutions are shaped by conservation goals, so respondents emphasize a personal commitment to their specialized work. As Johnson notes, "we work in museums and the cultural field because we love what we do, we believe in what we do—and that's why we don't get paid that much" (p. 32). The HDM Preparator echoes the satisfaction to be derived from his museum work. "If you can walk out there and go 'man, that's a great exhibit, we did a great job on that,' and you see people seeing that, enjoying it, it fills me with pride, makes me want to do a better job" (p. 9).

Each of the CRM graduates commented on the personal satisfaction that they derive from learning. Ramsden describes herself as a life-long learner and comments that she is driven by curiosity as well as a desire to build her skills when she engages in learning activities. Fougère indicates that learning is "a personal goal for me and I think it's important to learn as you work. I think that's how you grow in your job. And I think that's how you grow as a person" (p. 17). This intrinsic satisfaction in the learning process itself, regardless of the practical outcome, is a little discussed dynamic in the literature of transfer with its focus on productivity. This focus suggests that while educators and employers might see transfer as the 'holy grail' (Resnick, 1989) of continuing professional education, for learners the process itself is of value. Their lack of concern about return on learning investment seems linked to the notion that learning is valued for its career and personal benefits. Wilson emphasizes that while she did not experience extensive work-related transfer from her studies she found the process highly rewarding at a personal level, while Johnson expresses confidence that her learning will be of long-term:

> I think every job and career change, you're going to use different parts of it. That's how I looked at it when I took the courses…it's like "where do I see myself going, and what would help me get there?" I don't think there is any course that I regret taking or spending time or money on. At this point, I think it was all very useful. (p. 34)

Because each of the CRM graduates initiated their own learning, the goals that shaped both the learning and the subsequent learning transfer process were not closely tied to specific performance requirements. This suggests that they approached their CRM studies with a mastery orientation rather than a performance orientation, particularly in generalized

coursework that was not directly related to their functional needs. Both Fougère and Ramsden indicate that they engaged in the CRM program because they wanted a better understanding of the theory and practice of museum work, and while they selected courses that they perceived as relevant they were not directly linked to issues in the workplace. These goals and experiences seem aligned with Yelon et al.'s (2004) contention that mastery learning is motivated by a desire to achieve a deep understanding, which, in turn, facilitates transfer because such learners appreciate the underlying purpose and meaning of a domain, use effective learning strategies and exhibit greater persistence than performance-oriented learners. However, since learning in these settings is not strongly linked to organizational goals, transfer experiences often involve a degree of serendipity as learners recognize opportunities to apply learning when coursework heightens either their commitment to initiating a new project or clarifies ways in which new content has relevance. Johnson's initial goals in engaging in the CRM program were to acquire both knowledge and a credential for career advancement but, like Ramsden and Fougère, as she settled into her position at HDM, she began to link her learning with needs in the workplace in a self-directed manner. Both personal and professional goals motivated Wilson's involvement in CRM as she worked to gain a credential that would legitimize her practice and build her self-confidence as a learner and an advocate for Haida heritage. Like the other CRM graduates, the lack of performance expectations associated with new learning meant that her efforts to transfer learning were largely self-directed, and in her case, not always highly effective.

The topic of rewards as a motivator for transfer did not arise with any frequency in interviews, beyond references to the intrinsic satisfaction derived from museum work. Recognition of a job well done was noted in one case as a result of, if not a motivation for, efforts to make use of new curatorial and other skills.

> They presented me with flowers and thanked me—that was really nice. There are some touching moments like that that I've had. Mostly it's just pats on the back from our immediate supervisors. I'd say, across the board it is usually the VPs that do that. ...[My supervisor is] very supportive and thankful if we do a really good job. (Johnson, p. 31)

It is interesting to note that in all cases, CRM graduates have experienced career progression which seems at least partially linked to increasing mastery of CRM content along with managers' respect for their new credentials. Such credibility and career progression are noted by several respondents as general goals for engaging in their studies. However, actually transferring what is learned from CRM studies does not seem intentionally linked to career

goals, but seems more closely associated with shorter term interests in challenging, effective and appropriate practice. Johnson's efforts to curate an exhibition arise from the excitement she experienced in studying curatorship and her desire for challenging work, rather than from a strategic career goal. Fougère's involvement in culinary and public programming initiatives also are driven by an interest in responding to affordances, as opposed to a longer-term strategic career move. Her deeply held conviction that FoL should be more engaged with community, for example, was influential in her efforts to work in this area once timing and resources aligned.

Wilson's cultural values and stewardship goals are strong motivators in all aspects of her work although they sometimes put her at odds with Parks Canada norms. Unlike other CRM graduates, Wilson does not discuss her work in terms of career goals or rewards. Her emphasis is on the fulfillment of a commitment to her cultural heritage.

Learners' autonomous motivation and initiative

While learners exhibit considerable positional autonomy in their efforts to apply learning, they also exercise a degree of autonomous motivation to make use of learning beyond the boundaries of their positions. This seems linked with both the conscientiousness and perseverance that characterize their dispositions for transfer, and with their identity as professionals and stewards of cultural heritage. Fougère's colleague at FoL, for example, notes that "she is so motivated that if she sees a need, she starts to try to address it. If she sees a possibility, she goes towards it" (Researcher, p. 15). She adds that Fougère has been encouraged by management to develop because they perceived "that she had the capacity to do way more than simply take physical care of collections." Autonomous motivation is also evident in Johnson's efforts to curate a show, conserve a stagecoach, and redesign a collections vault. In each case these initiatives came from an internal commitment to best practices as opposed to performance expectations directly linked with the job.

Wilson exhibits values-based autonomy in her efforts to ensure that Parks Canada procedures are consistent with Haida conservation values. She comments that the need for adaptation can be overwhelming as her integrative view of natural and cultural heritage is not always reflected in Gwaii Haanas practices, despite organizational commitment to this stewardship approach:

> They're integrated, but not. Not when you sit and talk to scientists [who seem to indicate] "you have your job, this is my job over here." What I've done is said "well, okay, that's fair, but when you do this, you must take into consideration that we're part

> of this world." I'm talking as 'we' being Haida. At one time we were 30,000 people, according to my ancestors. This certainly wasn't a pristine place because we lived here. Trees were cut, terrain was changed for needs, beaches were altered for bringing canoes ashore, fish traps and fences and possibly clam beds were created. I've sort of made that part in-your-face: look at this world, because we're part of it. Our ancestors were a huge part of it. [Does] CRM from UVic have a place here? Probably, but I think, in a way, that takes the First Nation you're working with...to be part of it. You can't just talk about buildings in a little box. You can't just talk about plants and forget that people used them, or the ocean.... I think we have to have it more holistically. (p. 33)

Ramsden also exhibits autonomous motivation for learning and for transfer in her consistent interest in staying current with professional practices. "What I don't understand is how you can really function in this sort of position without going out and getting information and bringing it back, without going to courses and conferences and workshops. I just don't understand how I would be able to do my job without that" (p. 11). Whether these self-directed actions result from interest, values, or a professional interest in staying current, they are motivated by "an internalized desire to transfer learning that is initiated and governed by the self" (Gegenfurtner et al., 2009, p. 126), and are reflective of Cranton's (1996) listing of the characteristics of autonomous workers, including their capacity to conceive of goals and plans independently of pressure from others, to exercise freedom of choice, to make judgements on the basis of defensible beliefs, and to carry out plans of action (pp. 56-57). Johnson reflects that she is the voice for new practices: "If it's something I want to do, I have to budget for it, I have to get the budget approved, and I have to make sure it's carried out. If I don't bring it forward, it's not on the radar" (p. 28).

Not surprisingly, personal initiative emerges across the four museums as a powerful stimulus for learning and transfer. In each case, the CRM graduate initiated studies and emphasizes that personal initiative lies at the heart of much of her agency in applying learning successfully, particularly when organizational supports are not strong. Johnson reflects that part of the stimuli for autonomous motivation and initiative is the nature of museums themselves.

> ...it has to do with the fact that museums never have enough staff, and they never have enough money, and they are always scrounging to do things and get by. So to have [personal] initiative is almost the only way you're going to not only improve yourself, but improve your area at the museum. (p. 14)

Ramsden indicates that self-direction and innovative are important in her work. "I think that's one of the rewarding parts. Some days you wonder why you're sitting here signing invoices and writing policy...the flip side of that is that you do get to put new things in place, you

get to see new shifts, you get to position things so that you start to move in new directions" (p. 8). She adds "I guess I always had initiative...I'm one of those people who once you start you want to see it through, whether it takes four years instead of three years, you finish it" (p. 11). The importance of being self-directed is also noted by Wilson. "It's huge. You look at what you've got to get through...How do you fit them in? You have to decide for yourself" (p. 14).

Initiative includes being self-directed in planning for day-to-day activity while also balancing colleagues' needs and upcoming events. Fougère comments on the degree to which a respectful approach in exercising initiative builds reciprocal respect and trust:

> I like to sit and plan out my day and...work with very little supervision, unless I run into a problem, and then I'll get somebody's opinion. But any initiative that I take on myself I find that I will go to my supervisor.... He'll say "okay". He'll give [me] the responsibility to off and do it. I think if you prove yourself every time you do that, in a positive way, then they give you more room to grow. Knowing that you've had some training in that area, they give you a little more space. ...That's a trust and you earn that, and you gain knowledge as you go. (p. 8-9)

The following table presents responses to Survey 2, administered during interviews to gain graduates' perspectives on the degree to which they exercise initiative in aspects of their work.

Survey 2: Degree of Personal Initiative in Approaches to Work, Learning and Transfer
Personal Initiative involves "...a self-starting, active and persistent approach to work. Additional aspects of the concept are that this behavior is consistent with the organization's mission, goal-directed, and action-directed..." (Frese, 2001, p. 100). Using this definition, CRM graduates were asked to indicate the degree of initiative they exercise:

	Never	Rarely	Occasionally	Frequently	Sole Initiator
How often do you exercise initiative in defining the ways in which you approach your day-to-day work?				**Fougère** , FoL **Johnson**, HDM, in exhibitions **Wilson,** GH	**Johnson**, HDM, in collections **Ramsden**, MHM
...in identifying emergent knowledge and skills associated with your specific job?			**Wilson**, GH	**Fougère** , FoL	**Johnson**, HDM **Ramsden**, MHM
...in identifying emergent knowledge and skills that will enhance the museum's programs and services?			**Johnson**, HDM, in exhibitions **Wilson**, GH	**Fougère** , FoL	**Johnson**, HDM, in collections **Ramsden**, MHM
...in participating in professional development?		**Wilson**, GH	**Johnson**, HDM, in exhibitions	**Fougère** , FoL **Johnson**, HDM, collections	**Ramsden**, MHM
...in introducing new practices that impact my own approaches to my work?				**Fougère** , FoL **Wilson**, GH	**Johnson**, HDM **Ramsden**, MHM
...in introducing new practices that impact the work of others?			**Fougère** , FoL **Johnson**, HDM, in exhibitions	**Wilson**, GH	**Johnson**, HDM, in collections **Ramsden**, MHM
...in introducing new knowledge and practices that impact organizational services, priorities and goals?		**Johnson**, HDM, in exhibitions	**Fougère** , FoL **Johnson**, HDM, in collections **Wilson**, GH		**Ramsden**, MHM
...in monitoring and evaluating the successful implementation of new knowledge and practices?		**Johnson**, HDM, in exhibitions	**Fougère** , FoL **Johnson**, HDM, in collections	**Wilson**, GH	**Ramsden**, MHM (with Strategic Plan performance measures)

Table 12. Survey of initiative in case settings

Outcomes in this Survey echo outcomes in Survey 1 on positional autonomy in most instances, and therefore reflect the degree to which organizational complexity and decision-making structures influence individual capacity to exercise initiative (Axtell et al., 1997). It is

notable that when asked about their overall capacity to exercise initiative in their work in interviews, all respondents comment immediately that they are highly self-directed. However all but Ramsden offer more circumscribed responses when they analyze initiative on the task-by-task basis set out in the survey. This suggests that while they feel a high degree of freedom, in reality they must work within organizational confines in many aspects of their learning and transfer activities. With reference to indentifying learning needs and participating in continuing professional education, for example. Ramsden notes that she is wholly self-directed although she must still work within the confines of time, budget and relevance.

The initiative demonstrated by the four CRM graduates and their colleagues to learn, apply their learning and extend their boundaries is not shared by some colleagues. At FoL, for example one of Fougère's colleagues notes that "there's a lot of satisfaction with [existing knowledge] and compartmentalization of functions. 'This is the job that I do; this is how I've done it all along'…there's a very personal element to how one does one's job" (Researcher, p. 12). This is also noted in general terms by the Director of the MHM who reflects, "there [are] some people who don't take initiative. I don't know whether it's a confidence thing...I think it goes back to human nature. Not everybody is self-directed" (p. 11).

Ramsden observes that the AHF is largely reliant on its staff to initiate their own learning and transfer. "I do find it a little bit surprising that there's not more interest shown. There [are] platitudes certainly. 'Well it's great to see you do professional development.' But they don't really know what you did." This is echoed at HDM, where the VP comments that HDM relies on skills and knowledge gained through prior experience or through self-initiated learning, and speculates that lack of ongoing development may lead to "diminishing returns" (p. 11).

Maintaining initiative requires a degree of focus and conscientiousness. Johnson comments that, at times, a busy and product focussed work environment that is reliant on individual initiative, can get her down.

> ...there have been a few days in the last few months that I've felt like that. I have to just go home and regroup. I get really down from the attitude, and I guess if I was in charge, that's not how I would do it from what I've learned about what's successful and what's not, not only just in museums but in treating your staff. The HR course I took, too. ...it's was one of the problems that my predecessor had. She just got to the point that it became just a job. I have to battle that sometimes, and know that there's so much more meaning here. (p. 14)

Given the wealth of learning and associated transfer activity that may be attributed, in part, to both autonomous motivation and initiative exercised, these aspects of motivation for transfer seem of particular importance across all four museum case settings.

Learners' professional, job and/or organizational affiliation

And finally, the focus and intensity of learners' affiliations emerge as influential in transfer processes. These are grounded in both a philosophical commitment to practice and membership in communities of practice. As noted earlier, the passion and commitment to cultural stewardship that is evident in each case setting is a defining feature of both organizations and individuals. In every case setting, the nature of the work and the character of the setting help define the identity of the CRM graduate and shape the commitment that they make to effective practice. And as noted, across the four case settings, the sense of affiliation varies, depending upon the nature of the organization and the individual's ties.

Wilson, for example, indicates that her primary commitment is to the cultural heritage of her people and to ways in which future generations can know and value their rich but threatened history. "My affiliation feels like it's with Gwaii Haanas. Parks Canada is out there in Canada" (p. 3). She notes that "I think of myself as a conservator…I would like to [use] my experience...so that people understand more about who we are as people" (p. 5). This highly situated focus on CRM practice calls for adaptation of standardized professional concepts and practices to align with Wilson's culturally-mediated view of local and specialized needs of Gwaii Haanas. For example, Wilson indicates that she seeks to honour Haida conservation approaches although they may be at odds with Parks Canada procedures and threats to the site.

> I have directions from the hereditary leaders of Haida Gwaii that we're not to use any kind of insecticides, preservatives, or anything for *in situ* artides. Looking at my options and trying to be respectful of what's on the ground, be respectful of the hereditary leaders' wishes, and yet still trying to do a job to preserve a place. [It's] huge thinking about "okay, what's acceptable?" (p. 29)

While increased CRM knowledge is useful in negotiating and adapting practices in this setting, Wilson has relatively few external supports for decision-making that might guide her efforts to make use of new knowledge. This is in part because no one else shares her particular responsibilities within Gwaii Haanas, and in part because it is difficult to engage with external communities of professional practice with any regularity. "I need people to work with in this office. I've had no one to talk to, even if I had an idea" (p. 33). Wilson's lack of affiliation with

colleagues who might reinforce the use of standardized practices, combined with her strong affiliation with Haida values and approaches to conservation, may contribute to her assertion that the primary outcome of her studies in CRM is the reinforcement of her existing knowledge.

Even as Wilson's primary affiliation is with her cultural heritage and her community, Fougère expresses a strong sense of affiliation with her role in building public understanding of the specialized history and collections of Louisbourg. When asked if she regards herself as a museum professional, Fougère states "I tell people that I work for Parks Canada, that I work for the people of Canada, and that I work at Louisbourg" (p. 4). Fougère's disinclination to identify with an abstract professional title may be due to her career-long involvement with this somewhat isolated site and with professional norms that are carefully articulated for staff by Parks Canada. All Fougère's initial professional training and most of her collegial networks are within the Parks system. While the CRM program has introduced a range of professional best practices and networks she is aware that, unless they are aligned with Parks Canada policy and priorities, it is unlikely that they will be of direct value within her local work context.

Colleagues in both the Parks Canada case settings also reflect that they are not broadly engaged in professional networks beyond Parks Canada, since the heritage resources they care for and the design of their work tend to be very system- and site-specific (HG Data Specialist, p. 2; FoL Manager, p. 4). As the CRM manager at FoL notes, "I'm not going to jump on anybody within this section here for standing on [externally articulated] ethics, for standing on professional standards that they must and should follow, nor will Parks Canada. But if you get all tied up with this and that, it's always a world of compromise" (p. 4). A sense of detachment from external professional networks is experienced in both Parks Canada case settings due to geographic setting. "Louisbourg tends to have a feeling of isolation. I don't know if it's really an accurate [feeling] but certainly it's a pervasive kind of mood" (Conservator, p. 2). This is echoed by the Presentation Specialist in Gwaii Haanas: "we're so remote out here" (p. 3). Another source of detachment from external professional communities in these case settings is the reliance on regional service centres rather than outside consultants or networks for problem solving (HG Superintendent, p. 2; FoL Conservator, p. 3).

At HDM, Johnson's affiliations are with both the museum and its collection, and to a lesser degree with the broader Canadian and American professional communities. She emphasizes that her work in this context is more than just a job: "...it's just knowing that we're making a difference in our community, whether it be through exhibits, or wildlife presentations.

...People are learning and experiencing and appreciating. ...That's where the meaning for me is" (p. 14). In her work, Johnson relies on best practices articulated by professional associations such as the American Association of Museums since her prior work experience, the procedures set out in her professionally accredited workplace, her CRM studies, and her immediate supervisor all reinforce her commitment to professional standards in both collections and exhibitions (p. 4). However, as she is not currently a member of any professional association due to pressures of time and absence of organizational supports (p. 3), her affiliation is limited to codified sources of information gained through publications and online resource centres, and she expresses an interest in being better connected and supported. "I think [by] networking alone, you can learn so much about how people care for their collections" (p. 13).

Ramsden at MHM has a strong affiliation with both her museum and its community, and defines her practice as a service to both. However, she is very reliant on external professional communities to define and support various aspects of her specialized practices and provide guidance and collegial supports. This reliance is due, in part, to the absence of museum-related expertise within the MHM parent organizations, despite the expectation that her museum will meet or exceed professional best practices articulated by the Alberta Museums Association. Ramsden clearly self-identifies as a professional in her commitment to service, her involvement in professional activities, her adherence to procedural standards, and her engagement with continuing professional education. "I find that's the best way to find out what's going on. I listen to people with new ideas, challenging ideas, read journals, keep up with disciplines" (p. 4). She also notes that she looks to professional norms as a personal guide for ethical practice.

The significance of affiliation—professional or cultural—deserves further research to map what is clearly an influential role in transfer. This is aligned with Clarke's (2002) speculation that in professionalized settings with relatively unsophisticated approaches to training and development, the "strength of professional associations and relationships within organisations mean that [external] peer support mechanisms may be of far greater impact in determining transfer of training than the emphasis that has been laid on supervisory support in the training transfer literature" (p. 157).

Reflections on learners' agency for transfer

It is evident that this group of learners have characteristics that position them to exercise considerable agency in their efforts to learn—and to make use of their learning—for

professional practice. While they differ in their cultural and professional contexts, experience and specialized areas of practice, they all emphasize their commitment to learning as a means of achieving personal and professional fulfillment. They express passion for their work, and their accounts of how they approach learning and transfer indicate that they influence the transfer process through such dispositional qualities as conscientiousness and perseverance, emotional stability, openness to experience, extraversion and agreeableness. While levels of positional autonomy vary somewhat according to circumstances, all learners exhibit autonomous motivation and initiative that appears to play a notable role in animating transfer activities when they perceive them to be relevant and when they recognize affordances. They also cite instances in which they actively create opportunities for transfer based on their commitment to effective practice. Their self-efficacy, which is linked to growing mastery of content and confidence, also seems important, particularly if arduous far transfer is involved.

Although Wilson shares such agentic characteristics as positional autonomy, conscientiousness, autonomous motivation, and initiative with other CRM graduates, her agency in transfer differs in several ways. Her sense of professionalism and affiliation are associated with her cultural as opposed to her occupational affiliations. Since content in the CRM program did not align in many instances with either her needs or her approaches to specialized and culturally determined practice, she indicates that in many instances she did not master the content or identify affordances for transfer. Her enthusiasm for her CRM learning experiences is more strongly associated with a notable increase in self-efficacy and strategic skills, and she indicates that aspects of what she learned in the program served to reinforce existing knowledge. Her experience, relative to the experience of other graduates, reinforces the subjective nature of transfer processes.

This exploration of the complex conditions that support learning transfer in and across case settings reveals the importance of individual agency in all aspects of continuing professional education for museum practice in these four museum settings. While these settings offer inspiring and creative climates for learning and transfer, the general absence of strategic or systematic supports to operationalize the development and transfer of learning places the onus on the learners to initiate learning activities and negotiate a complex range of social and logistical considerations to adapt that learning in ways that make it meaningful. Learners' mastery of content, linked with considerable positional autonomy, capacity to recognize opportunities for the use of learning and a rich range of motivational factors, result in multiple

accounts of successful learning transfer experiences. Clearly, learning that has been construed and constructed in the CRM classroom becomes meaningful in these workplaces through the efforts of the learners—although in varied and situated ways.

Common and Divergent Transfer Factors across Cases

In its efforts to explore the influences of workplace climate and agency from a cross-case perspective, this chapter followed the organizational structure suggested in *Figure 3*: Influential Factors in Learning Transfer in Museums. This model has been useful in depicting the range of factors that have the potential to influence transfer of learning in these settings, and while its two-dimensional format inhibits the depiction of relational interactions among factors, the model captures the complexity inherent in transfer processes.

Like any model however, it allows for but does not convey the nuances or differences that arise in situated settings. For example, its graphic layout suggests that workplace climate and agency factors are equally influential, although these cross-case comparisons make it evident that some factors play more influential and consistent roles than others in the transfer process, both within and across these cases. While four cases do not offer sufficient data to generalize these patterns, the following synopsis of both commonalities and difference across the settings emphasizes the complexity of transfer dynamics. Like many other observations of transfer dynamics, these should be thought of as a continuum of positions rather than oppositional categorizations:

TRANSFER EXPERIENCES	Commonalities	Difference
	• all comment on the need to adapt generalized learning to situated needs. • all describe subsequent and complex additional learning and negotiation processes that are needed to adapt and make use of content • all see extended time frames for learning transfer as necessary to make learning meaningful • none have considered transfer as an issue from either a personal and workplace perspective. • all report that such functions as collections management that involve a relatively high degree of positional autonomy allow for easier transfer than those involving team-based consultation and decision-making.	• the level of reported transfer varies according to both the relevance of learning to learners' ontological positions and to workplace affordances. • the level of surprise at transfer efficacy varies; some see it as contrary to their experience, while others recognize a low level of transfer. • the degree to which learning is seen as transformative varies • boundary crossing varies

Table 13. Commonality and difference in transfer experiences

WORKPLACE CLIMATE	Commonalities across cases	Differences across cases
Organizational Factors		
Nature of the Museum	• strong commitments to effective museological and professional practice to achieve stewardship and public service goals • described as inspiring and meaningful sites for work	• increasing size and complexity impacts communications and inhibits the introduction of practices not aligned with plans, resources or protocols • Kinds and roles of short and long-term planning and goal setting vary according to the priority assigned to these processes
Supports for Learning	• no museum places strategic emphasis on learning through CRM or on transfer as a support for organizational or individual development. • while all museums engage in short or long-term planning, none identify knowledge and skills gaps as concerns in achieving goals. • while performance planning is undertaken, it does not address or implement learning objectives or strategies in consistent ways.	• some museums provide in-house training to address specific issues • some museums provide funding and time off with pay to participate in learning activities including the CRM program • where support is provided, professional development is variously rationalized as a means of rewarding employees, building morale, strengthening networks and building skills and knowledge.
Pressures for Change	• both internal and external pressures for change are described in all settings	• both the kinds and degrees of change vary across settings, as does the readiness of the organization to embrace new practices that facilitate change management.
Positional Factors		
Job Design and Level	• all positions rely on externally-articulated museological standards of practice • each position is isolated, in that it is the sole specialization in a particular area on site • each position involves positional autonomy in determining day-to-day priorities and in transfer learning that is of immediate relevance, as long as it does not impact colleagues' work	• clarity of position descriptions varies across the group • while all positions involve problem-solving, the degree of creativity required varies somewhat • levels of positional autonomy to influence change at the organizational level differ according to the scope and level of the position
Supervisory and Collegial Supports	• supervisors regard learners as professionals who hold responsibility for their own learning and for the use of best practices • supervisors are largely uninvolved in initiating, supporting or debriefing CRM participation • supervisors are unfamiliar with transfer concepts or processes	• supervisors may vary somewhat in their view of the benefits of CPE

Performance Expectations	• each setting uses performance planning and evaluation tools, but associated learning plans are not consistently implemented. • learners do not cite organizationally articulated goals the guide their CRM participation	• across PC, access and adherence to best practices vary • personal and career goals that guide CRM participation vary
Affordances for Transfer	• all settings are somewhat receptive to practices that enable them to achieve stewardship and service goals	• the more complex the organization, the more difficult it is for learners to integrate new practices within policies, procedures and plans that define approaches to work
Similarity and Relevance	• concepts and practices presented in the CRM program generally align with professional best practices that each setting ascribes to in principle.	• in practice, the similarity and relevance of conceptual, procedural and strategic concepts and skills gained through CRM studies varies across both situated museum settings and learners' jobs, according to resources, priorities, and in one case, to cultural context.

Table 14. Commonality and difference in workplace climates

AGENCY FOR TRANSFER	Commonalities across cases	Differences across cases
Ability Factors		
Mastery of Content	• each reports a better conceptual framework for understanding and engaging in practice from CRM studies • each gained a language that enables them to participate in organizational and professional discourse • while they report enhanced capacity for communication, they do not tend to make use of the specialized and theoretical terms that tend to be used in the classroom.	• reference to best practices and sense of commitment varies according situational relevance
Capacity Factors		
Positional Autonomy	• all exercise considerable positional autonomy in day-to-day work in lightly supervised professional roles • each gained greater recognition and respect as a result of actual—or perceived—mastery of content and note that this enhances their capacity for transfer.	• those in complex organizations are more restricted in their capacity to exercise positional autonomy beyond their day-to-day task setting • those involved in team-based activities (i.e., exhibition design) have less capacity to exercise positional autonomy than those working in more solitary roles
Perception of Affordances	• in the absence of pre- and post-course goal setting for the transfer of learning, the onus in each setting was on the learner to perceive opportunities for the use of learning	• as content seemed more relevant in some settings than others, capacity to recognize applications varied

Motivational Factors		
Disposition	• each notes that they appreciate the creativity inherent in their job	• level of openness to new ideas varies somewhat according to professional or cultural norms
Self-efficacy	• Each gained confidence in their ability and capacity to support learning transfer as an outcome of their CRM participation.	
Values and Goals	• Learners express passion for their work and value the ways it enables them to make a difference in their communities • Each indicates that they participated in CRM for personal and career goals as opposed to work-related problem solving	• the degree to which personal and professional goals were clearly articulated varied somewhat. • the degree of intentionality in making use of learning varied widely—and serendipity seemed to play a role in recognizing transfer affordances
Autonomy and Initiative	• Each initiated their involvement in the CRM program • Each expresses a commitment to personally defined standards of practice that positions them to act in personally autonomous ways. • Each exhibits initiative in pursuing learning through the CRM program and in putting learning to work.	• levels of confidence in acting upon autonomous motivation by exercising initiative vary somewhat
Incentives and Rewards	• all express the intrinsic satisfaction they derive from both learning and making use of their learning	• some gained recognition and experienced career growth that they attribute to learning and transfer processes
Affiliations	• all look beyond the immediate policies and procedures of the workplace for standards of professional practice	• professional affiliations vary from external associations, to internal but remotely articulated best practices, to culturally defined stewardship and relational standards.

Table 15. Commonality and difference in learners' agency

On one hand, these outcomes suggest that much museum work is grounded in a passion for knowledge and service that creates a receptive climate for learning as a support for best practices. As such these museums offer varied, if often unplanned, affordances for the transfer of learning. On the other hand, these cases emphasize that, in the absence of explicit and strategic supports for both learning and transfer, returns on investments in learning are difficult to plan for or measure. Not only are CRM learning outcomes difficult to value in the absence of links to organizational priorities, they are challenging to transfer in the absence of systematic supports.

In following my thematic model, there is a danger in discussing and analyzing climate and agency as separate phenomena, since the model organizes transfer dynamics in a way that masks how one area influences the other. Museum climates emerge as benignly receptive to new practices, but the absence of integrated planning, light supervision, and the absence of pre- and post-course goal setting suggest that their supports for professional development and strategic growth are not as fully developed as they could be. In this context however, learners exercise notable agency to engage themselves in the CRM program and associated transfer activities without the active involvement of their workplaces. While their agency is critical to both the learning and transfer processes in these environments and results in benefits to the museum, it also bears saying that the very act of independently exercising agency—as necessary as this might be for the learner to achieve personal and professional goals in these settings—distances the workplace from a sense of ownership or understanding of the learning process and therefore of the learning outcomes. Such learning, particularly from the generalized, remote CRM program, becomes a resource that the learner chooses to deploy if conditions and incentives are appropriate.

Chapter 6 Discussion and Implications

"What are the experiences of museum professionals as they seek to apply concepts, principles and skills that they have gained through continuing professional education?" "How do conditions in the workplace shape these experiences?" and "How does personal agency influence museum professionals' inclination to put new learning to work?"

As the four cases demonstrate, answers to these questions vary across settings and reveal complex, interdependent and relational phenomena that contribute to a more nuanced understanding of current and potential learning transfer dynamics in the museum world. Rich and largely positive accounts of experiences in putting learning to work convey a strong sense that continuing professional education is meaningful to these learners and museums. Case studies, with their small and individualized samples, do not offer broadly generalizable results. However, analysis of ways in which case data align with guiding themes offers insights that support the following discussions of case outcomes and of implications that might reasonably be identified for these case settings, for the Cultural Resource Management Program, and for transfer theoreticians.

This chapter begins with a synopsis and discussion of key findings. Outcomes associated with each of the three questions are explored in relation to contemporary learning transfer themes, drawing on case descriptions in Chapter 4 and comparisons presented in Chapter 5. Given the volume of the case data, this discussion pays particular attention to those findings that seem of special relevance to museum professional practice, as opposed to those typical of all workplaces. Reflections on the degree to which learning transfer in museum settings is aligned with or diverges from the more ubiquitous focus in the literature on the for-profit sector are interwoven. The second section offers a reflection on both the strengths and limitations of this study in addressing the research questions.

The final section of this chapter considers the implications of these findings for the learners and museums in these cases, for the CRM program, for the sector more generally as appropriate, and for transfer theoreticians. In doing so, it suggests avenues for further research that have the potential to strengthen ways in which learning is applied in practice.

Key Findings

The three research questions that animate this study seek to understand and make visible both the nature of transfer experiences in the case settings and the underlying factors that combine to shape museum-specific transfer dynamics. Key findings include the largely positive and meaningful transition of learning from CRM studies to workplace uses, along with the interdependent and relational roles of workplace social settings and personal agency in making this happen. These findings align with the socio-cultural accounts of transfer, while also suggesting that the service and stewardship orientations of museums, strong individual and organizational commitments to professionalism, generally unstrategic organizational approaches to professional development, and a high degree of personal agency all play influential roles in learning transfer in museum settings.

The findings discussed here begin with a focus on the nature of transfer encountered across the case settings, in keeping with the first overarching question relating to transfer experiences. More detailed discussion of underlying factors follow, in response to questions about workplace climate and individual agency. A final segment integrates these with a view to overall transfer dynamics.

Transfer experiences

"What are the experiences of museum professionals as they seek to apply concepts, principles and skills that they have gained through continuing professional education?"

Participants in this study offer multiple accounts of what they consider to be meaningful transfer and emphasize that they do not perceive—but have given little thought to—issues associated with the return on personal and museum learning investments. While the general literature of learning transfer suggests that transfer is very limited (e.g., Broad, 2005; Eddy & Tannenbaum, 2003; Haskell, 2001; Naquin & Baldwin, 2003; Tasse & Hrimech, 2003), there are two reasons to be cautious in suggesting that the positive findings of this study are unusual. First, general predictions of low transfer come from dominant discourses offered from cognitive, behavioural and organizational perspectives that do not tend to take the subjective and situated adaptation of new knowledge over time into consideration (Bereiter, 1995; Bransford & Schwartz, 1999; Hatano & Greeno, 1999). Although a full range of disciplinary perspectives does contribute to an understanding of transfer phenomena, when the outcomes of these cases are

considered in light of nuanced socio-cultural explanations of learning transitions to and within the workplace, my findings are not at odds with the predication that, over time, considerable learning will be adapted to meet local needs if and when personal agency and/or organizational conditions are in place (Billett, 1998, 2002, 2006; Eraut, 2004). Second, since this study does not seek to measure actual transfer in quantitative terms, it relies on participants' thoughtful but largely enthusiastic perceptions of the extent of transfer. And of course, perceptions of transfer are coloured by the learner's subjective view of what was learned, what was relevant to practice, and how they want their efforts to make use of learning to be understood. Comparing qualitative perceptions of how learning is applied over time and across personal and organizational settings with more quantitative measures of short term applications of new learning to specific occupational tasks is bound to reveal findings that seem at odds with those predicted in the conventional literature.

The generally positive perspective expressed by learners and colleagues in all four cases that learning activities have been beneficial and appropriate reflects the benign orientation to continuing professional education that is observed across the sector, and noted in Chapters 1 and 2. Twenty-one of twenty-two participants in this study emphasized the importance of ongoing learning for practice, although some also note difficulties in balancing learning with work and personal commitments. Their positive views of CPE also suggest that, in the absence of clearly articulated personal or museum performance measures for the application of learning, all learning outcomes are regarded as valuable, whether they relate to improved practice or more individual benefits including personal development, improved morale, generalized knowledge, career advancement, or satisfaction of curiosity. CRM graduates as well as their colleagues and supervisors indicate that their involvement in and support for CPE is largely intended for individual as opposed to organizational development, and in each of the four settings, participation in the Cultural Resource Management Program is seen as having considerable personal benefit in terms of building confidence, professional identity, career prospects, and ability to work within the museum setting with increasing insight and expertise. In each of the case settings, benefits to the museum are also described. However, as CRM studies have been undertaken voluntarily and in a self-directed manner, with limited organizational expectations for resolving work-based problems or improving task performance, museum benefits through learning transfer are typically described as somewhat unpredicted dividends of the learning investment process.

Despite the lack of organizational expectations and performance measures for learning and transfer in each case, it is evident that transfer learning processes—shaped by interdependent personal and social factors—are at play. The complex, extended experiences of adapting learning from CRM program to align with learners' subjective realities and to meet situated workplace needs effectively reinforce Eraut's description of transfer as "the learning process involved when a person learns to use previously acquired knowledge/skills/ competence/ expertise in a new situation" (2004, p. 212). While accounts of relatively simplistic and straightforward transfer are offered in each case, it is also evident that much subjectively constructed learning gained in the classroom must be re-contextualized and transformed through subsequent, often arduous, workplace-based learning and negotiation before it becomes meaningful. Eraut's (2004) analogy of an iceberg repeatedly comes to mind in analyzing data from the four case settings. He observes that course-based learning is equivalent to the tip of the iceberg, while:

> ...the further learning required to convert that codified knowledge into personal knowledge that is ready for use in a range of possible situations can be represented by that part of the iceberg which is hidden below the surface. ...Support for that learning is minimal and little time is set aside for it. The very existence of ice below the surface is symbolically denied. So when students find that learning is difficult (which it usually is) they are likely either to blame themselves for being inadequate or reject the theoretical knowledge as irrelevant. This raises the important question of how much further learning is required in order to transfer theoretical knowledge from an academic setting into occupational practice. (p. 220)

Eraut goes on to speculate that "traditional thinking about transfer underestimates the learning involved by an order of magnitude" and emphasizes that until measures to build capacity for transfer in both educational and workplace settings are improved, "the impact of education on the workplace will continue to be lower than expected and the quality of work will suffer from the limited use of relevant knowledge" (p. 220). Case outcomes provide ample evidence of considerable effort that learners devote to the processes of adapting learning and negotiating social and resource issues to put new knowledge to work. And while these cases reveal considerable transfer activity, descriptions of transfer experience raise the question of whether these processes could have been more productive and less arduous had more intentional approaches to learning and transfer been in place within these museums, as well as at the individual level.

Just as transfer experiences in the four case settings offer evidence of considerable subsequent learning to make CRM content meaningful, they also align with the explanations of learning for and in workplace settings that emphasize the relational interdependence of personal and social factors (Billett, 2002, 2010). A model of museum workplace learning (Figure 5) that I have adapted from Illeris (2004, p. 438)[30] provides a useful reflection of the personal and social interactions in the processes of learning to transfer learning that are observed in case settings, while also keeping complementary content and instructional factors in mind. Given the importance attributed to individuals' professional and/or cultural identities in shaping transfer in each museum setting, this model is particularly powerful in conveying the influential role of professional norms and expectations in complex processes of transfer in working practices.

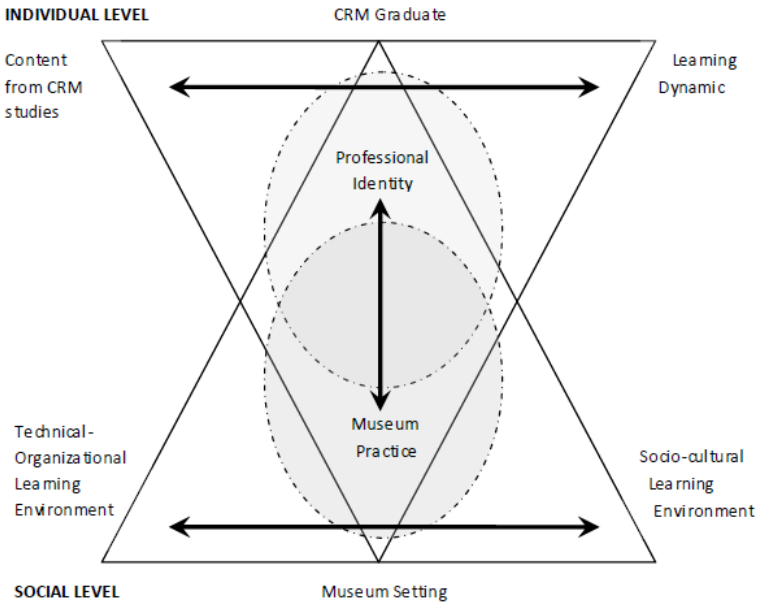


Figure 5. Museum workplace learning, adapted from Illeris (2004)

My adaptation of Illeris' model also reflects my observation that learners' experiences in learning transfer range along a continuum of increasing complexity, despite the tendency to categorize transfer activity in simple spatial terms in the literature. Nevertheless, the descriptors of near and far transfer in particular have been useful metaphors in recognizing and describing the nature of transfer experiences across the four case settings. In every setting, participants observe instances of straightforward, often procedural, learning that have been well matched to

[30] Illeris' model is presented and described in Chapter 1.

immediate workplace needs. Such 'near' transfer is particularly notable in collections management functions in which graduates exercise sufficient positional autonomy to apply their learning without broad consultation or adaptation. Instances of near transfer are described as easy and satisfying since they create an immediate link between learning and practice.

Instances of increasingly 'far' transfer, which are generally acknowledged as more difficult to achieve and measure, serve as the basis of graduates' most challenging but also rewarding transfer experiences. In every case setting, learners discuss ways in which conceptual, procedural and strategic learning became meaningful through complex combinations of personal and social initiatives that range from intentional to serendipitous. I note that the most commonly observed dynamics which characterize transfer in the case settings as 'far' are the separate or intertwined needs to:

- recognize the relevance of learning to workplace needs and affordances;
- build personal confidence in one's ability to apply new learning;
- exercise initiative, perseverance and creativity to adapt generalized learning to the situated needs of the workplace;
- integrate complementary prior knowledge; and/or
- wait for either an appropriate project or a shift in organizational receptivity to create an affordance for transfer learning activity.

These points are aligned with Eraut's (2004) five critical transfer steps[31] but emphasize the importance of self-efficacy in engaging in transfer experiences and highlight the importance of negotiating organizational systems to either respond to an affordance over time, or to proactively generate an opportunity that had not been afforded in the organizational context.

In each setting, participants emphasize the importance of time and a degree of patience in both recognizing and negotiating the application of learning that is not immediately similar to workplace needs. No sense of failure or frustration in not finding a short-term application for a complex or dissimilar concept is expressed, perhaps because individually-initiated learning has

[31] Eraut (2004) indicates that the following are critical steps in transfer processes:

- The extraction of potentially relevant knowledge from context(s) of acquisition and previous use.
- Understanding the new situation, a process that often depends on informal learning.
- Recognizing what knowledge and skills are relevant.
- Transforming them to fit the new situation.
- Integrating them with other knowledge and skills in order to think/act/communicate in the new situation (p. 212).

not been undertaken within the context of clearly articulated goals for application. If affordances for use cannot be identified—or created—within the museum context, all four of the learners reflect that their learning also has meaning within broader professional and community contexts. Learning that is not of immediate relevance in the workplace is described as useful in expanding professional identities, building understanding of external professional contexts, strengthening engagement in a wider professional communities, and/or of being available for some future use as careers unfold. Affordances for meaning-making provided outside the workplace are not dealt with in any detail in the literature of learning transfer yet they offer learners with some degree of confidence that all their learning is of value in one setting or another.

While helpful in recognizing and describing transfer experiences in museum case settings, the near/far dichotomy masks the relational complexity of transfer processes that are taking place within case settings. The transfer experiences described in each setting clearly support the contention in socio-cultural explanations of transfer that both personal agency and the social/environmental conditions of the workplace interdependently impact the likelihood of transfer. Drawing on Billet's discussion (eg., 2001a; eg., 2001b, 2004, 2008) of the relational interdependence of agency and invitational workplace conditions and on my observations of case study dynamics, I have developed a model (Figure 6) that helps suggest the likelihood of transfer in case settings. While it reduces all the factors that shape agency and workplace climate into two categories, it illustrates the highly contingent and situated nature of transfer phenomena by depicting transfer factors as intersecting continua. Depending upon conditions in their museum settings, graduates' transfer experiences tend to be positioned primarily in the upper left quadrant, with some in the upper right quadrant. This generalization across cases is grounded in the observation that agency factors consistently combine to create strong personal supports for transfer, while workplace affordances vary within and across case settings according to a range of factors. The model also suggests the implications of changing conditions. For example, when the graduate at the historic site developed an interest in community engagement at a time when her site was not receptive, her capacity for transfer was limited. As the historic site became more receptive to public involvement, her success in building community relations increased. While somewhat reductionist, this model serves as a useful reminder that workplace and agency factors do not act in isolation from one another in shaping transfer.

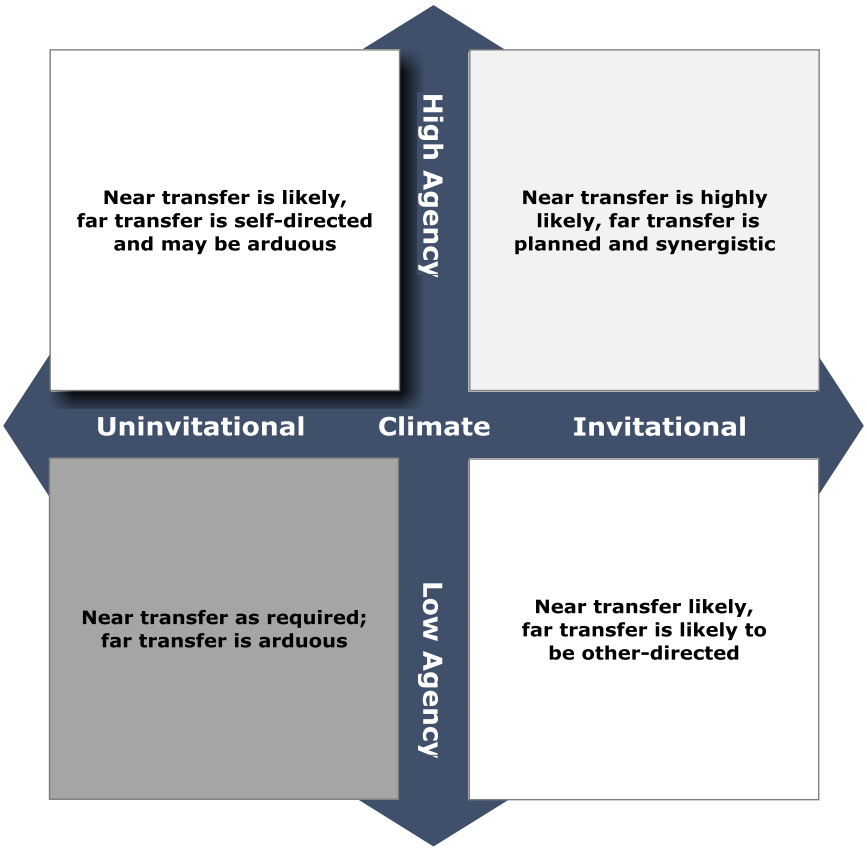


Figure 6. Relational interdependency of agency and climate

Museum climates for transfer

"How do conditions in the workplace shape transfer experiences?"

Despite considerable differences in the nature, complexity and size of the four museum case settings, powerful organizational commitments to cultural heritage stewardship and public service emerge as defining characteristics. These commitments establish clear expectations for professional practice to achieve conservation and education goals, and create an organizational culture that inspires a strong sense of organizational affiliation among the case participants. Workers in all case settings state that they are engaged in meaningful and privileged work that is guided by their organizations' museological roles and specialized missions, goals and functions. Their comments convey a sense of organizational well-being that is connected with the achievement of meaningful goals. In each case setting, staffs' professional roles are fairly clearly defined and bounded, and organizational standards of and approaches to practice tend to be

consistent with professional norms. A palpable sense of energy, even urgency, to achieve museum goals shapes day-to-day work in these busy and creative environments, and there is a consistent sense that museums are receptive to evolving professional best practices if they help them respond to a complex range of cultural heritage and management challenges and opportunities. Within each case setting, change in such areas as community relations, approaches to exhibitions, visitor experiences, revenue sources and conservation strategies among other things, create tensions and offer affordances for new approaches to work.

Despite this benign sense of receptivity to new practices, none of the four case settings link strategic goals and plans with projections of needed expertise or personal or organizational development strategies. Three of the four museums work within long-term plans that set out priorities for new programs, facilities and activities that respond to both initial pressures for change and external expectations of organizational performance, but none have undertaken skills analyses to identify gaps that might inhibit the achievement of goals. Three of the four also have explicit professional development policies and resources in place, but as these are not closely integrated with annual performance goals, since learning plans are inconsistently implemented at the working level, and because few pre- and post-learning transfer strategies are utilized, CPE is not positioned to contribute to strategic organizational development. In two case settings, there are active in-house training programs that are instrumental in ensuring that staff take a homogenous approach to prescribed task performance. These are linked to multiple instances of near transfer as staff bring organizationally-endorsed practices back to work. However, learning from participation in the generalized and more conceptual CRM program —or from participation in other forms of CPE—is not normally planned or undertaken with a view to meeting immediate or longer term organizational needs. Such learning is valued by learners rather than the museum, and their efforts to put it to work tend to take place in benignly receptive environments that may not regard new concepts and skills as strategically significant.

Low levels of museum involvement in performance planning integrated with strategic planning is one notable finding across all case settings. Another characteristic of all settings is considerable reliance on external professional agencies to define learners' professional practice. In one case setting, the museum is clearly committed to adhering to standards for museological practice established by the provincial museum association as part of its institutional accreditation program. These professionally endorsed standards serve as the measures of local organizational and personal performance. Since museum staff, rather than their civic managers,

have the expertise to determine if their practices align with such expectations, this positions them to make decisions on transfer activities. This seems consistent with Daley's (2002) observation that when external "professionals sanction, support, and affirm…learning as important in the professional role or the professional self identity, then the information from a CPE program tends to be readily incorporated into professional work" (p. 82).

In the two case settings that are nested within the complex national heritage site system, professional standards and practices are established for the entire system at the headquarters level. While these directives for practice are derived from standards articulated by the broader museum community, professionals working at the local level tend to define their professional identity and seek their reference points within the system rather than outside. Only in the mid-size museum is there evidence of some locally derived and controlled practices in the absence of close connections with external professional communities, and even these are largely informed by professional standards accessed through procedural manuals and/or obtained through prior education. While learners' positional autonomy varies with the size and complexity of the museum in which they work, the specialized professional expertise that they hold accords them a degree of individual autonomy. This aligns with Eraut's (1994) observation that "the specialist knowledge base of a profession...confers status upon it and provides the centrepiece of its claim to autonomy, the argument being that only fellow members of the profession are sufficiently knowledgeable to judge the work of their colleagues" (p. 223).

Another notable characteristic of these museum case settings is the degree of isolation that learners have from colleagues who do identical work. In each case, the learner is the sole specialist in a particular area and while teamwork creates synergistic working groups, there is a sense that learners lack colleagues with similar roles and expertise who can provide immediate and useful feedback for transfer tasks, particularly if significant change is required. Some turn to the professional networks noted above to reinforce their identity and confidence and to seek advice and support for transfer initiatives. In one case in which professional networks are not meaningful or accessible to the learner, it is evident that isolation from supportive and knowledgeable colleagues inhibits transfer activity.

Positional specialization, isolation and autonomy situate learners as authoritative experts in each case setting, and appear to inhibit supervisors' engagement in planning for and implementing new practices despite good relations with learners. In each case setting, supervisors express discomfort in prescribing learners' developmental needs or plans, saying

that the CRM graduate has both the capacity and obligation to plan for their own development. Low supervisory involvement in the identification of learning needs is further compounded by a low level of engagement in related human resource management and development functions. While all supervisors facilitated some form of annual performance planning, none expressed a strong commitment to debriefing on this process or linking it to learning plans. The supervisors that I spoke with were unfamiliar with concepts of learning transfer, and while debriefing after learning is occasionally done, no systematic transfer measures are offered to support the learner in the process of making self-initiated learning meaningful. In a case setting in which the learner has extensive experience and plays a senior management role, low supervisory involvement in planning for learning and transfer is not an issue, although the learner expresses disappointment with a perceived lack of interest. In the other instances in which learners are less experienced and confident in their roles, lack of supervisory support is noted with a degree of frustration. Varied learner responses to low levels of supervisory engagement in planning and transfer align with research findings that suggest that supervisory supports for transfer become less influential as the learner gains confidence in their own capacity to regulate their own performance (e.g., Chiaburu & Marinova, 2005; Coetzer, 2007).

The learning environments in these museum case settings—shaped as they are by a stewardship and service orientation as well as by limited resources, a lack of planning for learning and inconsistently implemented professional development policies—generally emerged as somewhat expansive to restrictive when considered on Fuller and Unwin's (2011) continuum of workplace conditions that facilitate learning. While each differs in how learners' work is defined, those case settings that encourage team-based interactions and allow participation in decision-making can be considered as more expansive learning environments than those in which practice is more regulated and siloed. Given the degree to which the learning processes inherent in transfer activity are linked to workplace learning supports more generally, this suggests that these case settings could offer more intentional approaches to learning, development and transfer.

A number of other organizational characteristics also emerge as influential in shaping learning transfer climates in museum case settings. Size was clearly influential. The bigger the museum setting, the more complex the systems that define and regulate work practices, control communications, and shape decision-making. On one hand, the large institutions (FoL, GH) have policies and resources to support continuing professional education. On the other, the cases

demonstrated that their remotely prescribed professional standards and practices make it challenging to apply new learning at local levels. These museums also work within annual work plans that inhibit the introduction of new practices if they require substantial time or other resources. Conversely, the smallest museum, with its immediate and collegial capacity for communication, can assess and implement new practices with relative ease, although staff also note the need for advanced planning when resources are a determining factor.

The nature and design of work was also influential in transfer processes in these museums. When work is team-based, involves conceptual thinking and input from a range of specialists, accommodating new approaches to practice is described as challenging. Across the case settings, learners reflect that exhibition design and development, public programming, and a range of management tasks require negotiation, time and adaptation to bring new practices into play. Conversely, curatorial and collections management tasks are consistently cited as receptive to new practices as long as they fall within the positional autonomy of the learner and do not have implications for the work of colleagues. When curatorial or collections activities are more inclusive however, the complexity of transfer increases.

The creativity inherent in a number of the positions held by learners and their colleagues was noted as influential in creating organizational receptivity for new practices, despite little attention to this factor in the literature of learning transfer (Awoniyi et al., 2002). Whether learners were involved in stewardship, collections, exhibitions, or management roles, they note that their positions required and enabled them to exercise creativity to resolve problems, to add meaning to cultural resources and associated stories, and to develop engaging programs and services. As creativity emerges as an integral element of these museums' stewardship and service roles, this unanticipated factor may play a distinctive role in transfer in museum settings.

Not surprisingly, availability of resources including time, funding and complementary expertise was also described as influential in the learning transfer process, regardless of the size of the museum. In each setting, participants note that until resources are available, often through forward planning to acquire grants or permissions for projects, or for inclusion in work plans, capacity to integrate new ideas is limited. Time is noted as a particular resource issue—time to advocate for and/or to experiment with new practices is rarely allocated at the management level, placing the onus on the learner to determine best approaches to fitting new practices within the day-to-day press of work. Complementary skills, whether they reside in the

learner or in colleagues, are also described as influential in both positive and negative ways. In instances in which a new concept requires buy-in and specialized input from other team members, the expertise and receptivity of colleagues must be further developed. Conversely, when colleagues are already receptive to new ideas, their enthusiasm is helpful in motivating the learner to put new concepts to work.

As Billet's (2001) notion of an invitational climate for transfer is evocative of intentional, strategic and proactive organizational efforts to seek out, welcome and accommodate new learning, it does not effectively describe the conditions encountered in these museum case settings when learners seek to introduce content from the CRM program. Instead of being invitational, these cases offer busy environments that are receptive but distracted when learners seek to introduce new concepts and practices from CRM. Since supervisors and managers have had little involvement in initiating or selecting content from CRM studies, organizational understanding of—and engagement with—CRM content is low, and the onus rests with learners to advocate for use.

Learners' agency for transfer

"How does personal agency influence museum professionals' inclination to put new learning to work?"

Since the four museum case settings extend benignly disengaged welcomes to learning transfer from the CRM program, the agency of graduates emerges as the critical factor in achieving the high perceived levels of successful transfer that are described. Even as enthusiastic, possibly biased, accounts of putting learning to work come from the very people who are engaged in them, colleagues' observations of learners' agency also help to affirm that learners play key roles in animating transfer. Colleagues also reflect that other professionals in these workplaces do not tend to demonstrate the same engagement in learning and learning transfer as CRM graduates.

A consistent and notable theme that runs throughout all interactions with CRM graduates—and their colleagues—is the passion they express for their work in what they consider to be inspirational environments. They describe a deep sense of emotional investment in and intrinsic satisfaction with their involvement in building understanding of collections and the stories that they hold, in creating meaningful and engaging experiences for communities and

other audiences, and in working with one another in synergistic and creative ways. A number also comment that they appreciate that their work has integrity and purpose. In each case, participants observe that they feel they make a difference through their specialized work, and while some note concerns about low levels of pay, organizational dynamics or resource challenges, most indicate that there is no other occupation they would rather be involved with. All express a strong affiliation with their museum, affection for colleagues, and appreciation of organizational goals. However, as many study participants have worked in other museum settings and describe the possibility that they will work elsewhere, it is evident that, for the most part, this passion for museum work transcends current positions to encompass museum work more generally. Ramsden, Johnson and Fougère all express some interest in tackling new challenges in other settings. And while Wilson in Gwaii Haanas does not express a desire to move elsewhere, her passion for her work is grounded in her capacity to illuminate the lives of her people as opposed to a singular commitment to her employer.

This consistent emotional connection with work—and with learning for work—is not explored in great detail in the literature of workplace learning (Beatty, 2011; Bierema, 2008) or learning transfer, although Sié and Yakhlef (2009) suggest that it is a predictor of transfer since "the more passionate experts are, the more they are intent on sharing their expertise with others" (p. 179). They also observe that "passion helps sustain experts' efforts in times of failure, and pushes them to strive beyond present understanding" (p. 179). This is also noted by Suchy (2004) in her exploration of the emotional intelligence inherent in leadership in museums. Museum director after museum director in Suchy's study comment on both their passion for their work and its role in focusing and inspiring their practice. The role of passion in this study seems consistent with Sié's and Yakhlef's (2009) affirmation of "the centrality of passion to the process of knowledge acquisition and transfer" and their suggestion that "passion functions as an internal motive to acquire and to transfer knowledge. Through passion knowledge shifts from the personal to the social sphere…" (p. 184).

Passion for museological work seems closely linked with learners' conceptions of themselves as professionals who are guided by externally articulated ethics, specialized knowledge, standards of practice, performance expectations, and commitment to a broader set of conservation and service goals than just those articulated within their museum setting. While professional contexts vary and work identities are also shaped by specialized and situated work in these settings, it is evident that learners' affiliations with broader communities of museum or

cultural conservation practice are influential in setting learning and career goals, determining ideological approaches to their work, conferring autonomy, and providing personal performance measures. All these factors build capacity and motivation for the use of best practices.

Direct personal connections to external professional associations and resources are described as influential in supporting day-to-day practice in the small and mid-size museums, although it is evident that the ease of access to external supports impacts the degree of actual engagement in professional communities. In the two case settings nested within Parks Canada, system-wide tenets of organizationally-defined ethics and standards contribute to a sense of professional identity that transcends local site affiliations. While professional standards in these instances are drawn from and comparable to those of external professional communities, the Parks Canada participants derive much of their sense of professional identity from membership in the broad Parks Canada community of museum and heritage workers. And, while Wilson is accorded organizational recognition for her role as a cultural resource manager in Parks Canada, at a personal level she clearly identifies as a conservator of her peoples' heritage and is guided by a framework of ethical tenets and standards of conservation practice that is grounded in the Haida worldview and articulated by hereditary leaders and the community. While her frame of reference for professional practice is different, like the other participants, she looks beyond her immediate organizational context for guidelines for practice, establishes learning goals to inform her work, struggles to align traditional and normative approaches with contemporary processes recommended through both organizational policy and CRM learning and, to a considerable degree, is accorded respect as a somewhat autonomous professional who is self-directed in her work. Transfer in all four cases involves the need to align learners' professional commitments to the use of current and emerging tenets of best practice with the situated realities of the museum setting. This seems consistent with Daley's (2002) observation that professionals more generally "often choose to align themselves with the tenets of their professional work, rather than with the organization in which they are employed" (p. 80).

Beyond a strong conservation ethic and sense of professional identity that seem to be shared among learners and their colleagues, both disposition and initiative stand out as agentic characteristics. Given that each of the subjects has elected to pursue a diploma of their own volition and with mixed financial and other supports from their organizations—while many co-workers haven't taken this approach—it seems reasonable to assume that this small group is inclined to use agentic behaviours around learning and its transfer. Learners themselves, as well

as colleagues across all case settings, reflect on the 'unusual' level of commitment that CRM graduates bring to learning for professional practice and attribute it to a level of curiosity and energy that consistently motivates them to seek out developmental activities in the classroom and in the workplace. This suggests that they bring a disposition (Bereiter, 1995; Herold et al., 2004) for transfer to their learning, although dispositional characteristics differ across the group.

It is salient that all describe their desire to learn as a drive that will continue to draw them to learning activities, formal and informal, into the future. Each indicates that participation in the CRM program was motivated by a desire for a professional credential, but also by a strong but generalized commitment to improving their abilities for practice. While each states that their selection of courses was related to the nature of their work and interests, they also indicate that specific opportunities for the application were normally identified during or after the learning process, rather than beforehand as a strategic and intentional approach to resolving work-based issues or fulfilling performance goals. This reinforces the importance of their disposition for transfer as, in addition to initiating learning activities, they are largely self-directed in identifying affordances for the use of their learning. The combination of curiosity, perseverance and a desire to influence positive change is clearly influential in drawing each to the classroom and in continuing the subsequent learning process in the workplace to adapt learning and negotiate for the application of new concepts. While Wilson encounters challenges in perceiving the relevance of her CRM learning in her highly situated and culturally-defined practice, her commitment to learning for personal development and her integration of strategic skills are evidence of her disposition for learning and transfer.

Learners' disposition for learning and for its use is actualized through a level of initiative that, again, can be seen as particularly notable within this group. While other workers in these case settings have similar opportunities to engage in learning and to lead transfer efforts, learners and their colleagues observe that not all museum workers are as inclined to pursue these goals. Personal initiative is described in each setting as a highly influential factor in moving beyond perceptions of affordances to acting on them, particularly in instances of far transfer which involve assembling resources, shifting priorities, building supports and gaining further knowledge for implementation. Learners' initiative appears to be somewhat shaped by a sense of individual autonomy, in that learners comment on their self-directed sense of professional obligation and capacity to act on their specialized knowledge when they perceive a need to advocate for a better approach to practice. Having positional autonomy to do so improves the

likelihood that they will be effective, but individual autonomy can be seen as a separate and influential factor in motivating learners to animate transfer in these museum settings.

With specific reference to the clusters of ability, capacity and motivation factors, the following agency factors seem particularly salient in these museum case settings:

Ability to engage in transfer tasks

Learners in all four case settings comment that they draw on personal worldviews and previous professional and life experience to construct and construe knowledge gained in CRM and then to further adapt it to the needs of the workplace. In doing so, they also describe personalized learning outcomes from generalized conceptual, procedural and strategic content. Varied accounts of transfer experiences highlight the important roles that learners' levels of expertise along with their strategic skills play in engaging in transfer tasks. As they became increasingly confident in their mastery of conceptual and procedural knowledge, comfortable in participating in the discourse of museum practice, and aware of how to negotiate varied obstacles to transfer within their museum climate, each of the learners comment that their ability to apply learning was enhanced, although Wilson at GH reflects that her transfer experience was limited by the dissimilarity of learned content and workplace needs. All note the value of theory in creating frameworks for understanding approaches to work—and all note that the development of abilities for transfer takes time and patience, particularly in matching their learning with affordances in the workplace. While the outcomes of this study cannot establish causal connections between the developmental level of the learner and the way in which learning is utilized, repeated comments suggest that increasing experience and confidence in approaching transfer processes have been instrumental in recognizing affordances and identifying ways to advocate for and adapt learning to local needs.

Capacity to exercise agency

The degree to which learners have the capacity, within the context of their positions, to exercise agency also emerges as influential in these case settings, particularly as positional autonomy links with their sense of professional identity and expertise. Under the previous discussion of organizational factors that influence transfer climate, the degree to which job design encourages autonomous behaviours is described as influential in determining learners' scope and authority to act. This is echoed in the results of 'Survey 1: Degree of Autonomy in Approaches to Work, Learning and Transfer' that indicate that learners are able to exercise

differing levels of positional autonomy in various aspects of their jobs. In each case setting, learners are accorded considerable autonomy in setting day-to-day work goals, based on the specialized and somewhat isolated nature of their practice, as well as on the perception of supervisors that their professional status enables them to be largely self-directed. However their capacity to exercise sole discretion in transfer that impacts the broader organization is more limited by either their position within a hierarchy or by the nature of their work. In every setting, transfer was described as relatively straightforward when the learner was able to make judgements about the immediate relevance of learning to their immediate work. Transfer was described as more complex and contingent in team-based activities, although synergies among teams are also noted as creating important supports when learners present compelling cases for new practices.

Another aspect of capacity that was evident as learners describe transfer experiences is their growing power to recognize and act on affordances as expertise, along with understanding of and influence in the organization, expands as a result of learning processes. One of the strongest themes that runs throughout these accounts of transfer experiences is the ways in which learning, and the experience of applying learning, has helped consolidate learners' confidence, self-efficacy, and organizational awareness, making subsequent learning and transfer less arduous. Growing assurance in conceptual and procedural knowledge lends learners authority in their own eyes and in those of their colleagues, while growing confidence in their capacity for self-reflection, communications, planning and negotiation, enables learners to be increasingly strategic in their efforts to adapt learning and negotiate its integration with practice. If enhanced confidence can be seen as a benefit of CRM learning, its integration in approaches to work is a critical and pervasive transfer outcome. This is particularly evident in Wilson's accounts of transfer. While she reports relatively low transfer of conceptual and procedural knowledge, it is evident that CRM learning strengthened her strategic capacity and therefore her effectiveness in the workplace in notable ways.

Motivation to exercise agency

As noted above, learners in these cases are motivated by a passion for their work and a strong professional identity that supports goal setting, along with dispositions that value learning and the application of relevant practices. Learners also show a high level of initiative connected with perseverance that prompts them to work toward transfer goals over time and in

the face of varying degrees of organizational inertia or resistance. These factors are notable across all four cases, although it is recognized that this sample is predisposed to agentic behaviours, based on participants' self-directed participation in the CRM program. Beyond this strong commitment to museum practice, other motivation factors that may be seen as influential in these transfer experiences include:

- **Autonomous motivation**: Autonomous motivation is closely linked, but distinct from positional autonomy, in that the onus for exercising autonomy resides in the learner as a self-directed expert with a sense of professional obligation to work toward appropriate goals (Deci et al., 1991). There are numerous instances in these cases in which a professional with relatively low positional autonomy exercises autonomous motivation to introduce new practices. And while it was not evident across these cases, it is also conceivable that someone with high positional autonomy but a low sense of autonomous motivation would not choose to act on new practices even if affordances are evident. A compulsion to act on a sense of professional duty is reported across the group and by colleagues. They acknowledge that, as the sole expert in their area of professional practice, they have the capacity as well as the obligation to introduce new, relevant—but not organizationally anticipated—practices if they can advocate for them effectively. Initiative, as noted above, is a critical element in exercising autonomous motivation in these cases. Those working in conservation and collections roles reflect that taking the autonomous initiative to act is a relatively straightforward process; those working in management, program and exhibition design emphasize the complexity of self-directed planning for and negotiating such change since it impacts the work of others.
- **Self-efficacy**—while self-efficacy and confidence are noted above as integral to ability for transfer, they can also be seen as instrumental motivators, in that they are, to some degree, dispositional and contribute to learners' inclination to tackle new and daunting projects. In each museum setting, learners describe instances of self-initiated learning and transfer activities in which they undertake projects that they find intimidating but worthwhile and persevere despite the possibility of resistance or failure. In putting themselves on the line, they indicate that they draw on a personal sense that they have the resilience to work their way through a challenging transfer initiative. Several also note that until they have sufficient confidence in their

ability to engage in a process, they will hold off and reflect on how best to approach a situation.

- **Rewards**—learners in each setting noted a few extrinsic rewards that accrue from transfer activities. Recognition, praise, flowers, and successful products and programs are cited as valued outcomes, and in all cases learners indicate that job changes and promotions are linked to the increased ability and capacity that results, in part, from CRM participation. The rewards that are most enthusiastically expressed however are more intrinsic. A sense of accomplishment, enhanced self-efficacy, and pleasure in making a difference as part of a service ethos are noted by all learners, accompanied by the recognition that museum work is its own reward. As several learners note, they are not doing museum work for the money. This is aligned with Deci et al.'s (1991) contention that intrinsic motivators are likely to be more powerful antecedents of self-determined learning than extrinsic ones, and echoes Janes' (2009) observation that museum workers tend to be driven by satisfactions inherent in their work.

The literature of learning transfer predicts that agency is influential in putting the content of continuing professional education to work. This is evident in case settings and, given my earlier observation that these museums offer benign but unstrategic environments for transfer, these findings indicate that learners' abilities, capacity and motivations are essential to the introduction of new practices. Furthermore, while each case varies in its details and outcomes, accounts of transfer experiences suggest that creativity, passion, professional commitment, and initiative play integral and distinctive roles in making learning meaningful in these museum. The following elaboration of my thematic model of climate and agency transfer factors (Figure 7) reflects characteristics that seem of particular influence in these museum case settings:

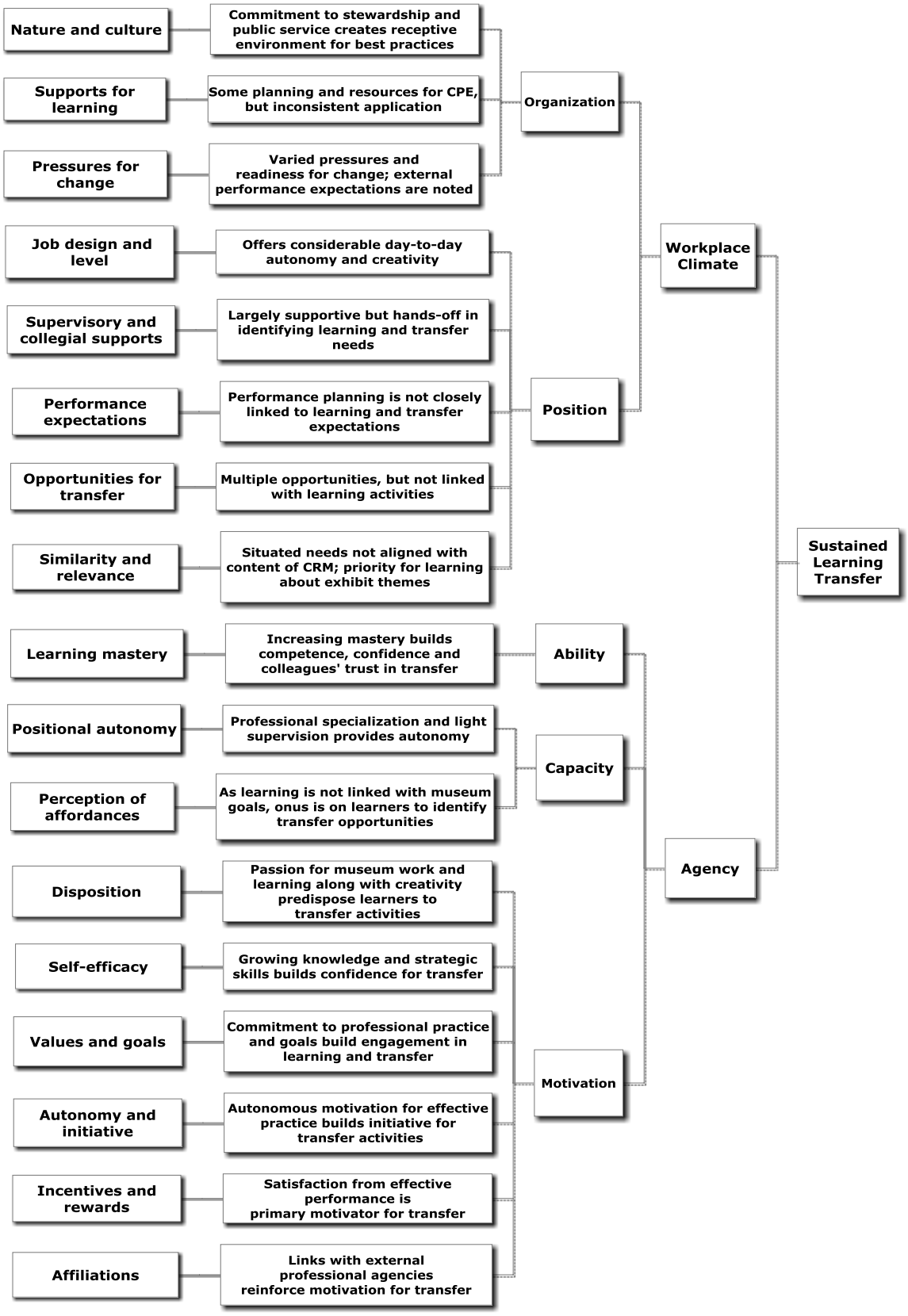


Figure 7. Notable transfer dynamics in museum case settings

A reflection on intentionality

Bandura (2001) holds that intentionality and forethought lie at the heart of agency in saying that "to be an agent is to intentionally make things happen by one's actions" (p. 2). However, serendipity—supported by Bandura's other agentic characteristics of self-reflection and self-regulation—also plays a notable role in transfer experiences across the four cases. These CRM graduates, like other professionals, offer comments that indicate that they have engaged in professional development "without a clear understanding of how knowledge learned in CPE becomes meaningful in practice" (Daley, 2001, p. 40), and describe multiple instances of transfer that occurred when unexpected combinations of events provide unanticipated affordances for transfer. This seems linked with the reality that their learning has normally been undertaken without strong connections to organizational or performance goals. While learners have the strategic, conceptual and or procedural knowledge to respond to affordances in agentic ways, the notion of a deliberate and systematic form of agency to achieve established transfer goals is not consistently at play in these case settings. This finding suggests that agency is not as deliberative a process as the literature seems to indicate, and aligns with Ellstom's (2011) observation that:

> ...while (work) actions are under certain conditions clearly deliberate and reflective, they are under other conditions best described as automatic or epitomized... Furthermore, the intentionality of actions does not necessarily mean that the actor has clear intentions, or goals before acting. …On the contrary, intentions, motives and goals may sometimes be viewed as reconstructions that are discovered during or after an action. (p. 109)

The degree to which learners are able to utilize metacognitive frameworks and strategic skills that enable them to reflect-in-action (Schön, 1983, 1987), to exercise judgement, to perceive affordances on the fly, and to adapt their learning, seems critical for transfer in these museum environments since they lack a high degree of prior performance planning. It also suggests that learners who are able respond to serendipitous or unexpected affordances are working at proficient levels (Dreyfus & Dreyfus, 2005) where response activity is largely intuitive and enables them to compensate in the absence of intentionality.

Interdependence of workplace conditions and agency in transfer experiences

The discussion above has focussed on the separate influences of museum climate and agency in shaping transfer experiences. However, it is important to end these findings with a

reflection on their interdependence, since there is much evidence in these cases that, just as museum environments influence learners' actions, so learners reciprocally influence workplace conditions and practices. As Billett (2007) notes with reference to learning for and in the workplace, "the key premise behind…relational interdependence is that neither the social suggestion nor individuals' agency alone is sufficient to enact the desired learning and the remaking of the cultural practices that constitute work" (p. 189-190). In all case settings, there is a constant interplay between learner's construction of knowledge and the ways in which their museum provides opportunities to make it meaningful. While this is generally a positive interaction given the mutual dedication to stewardship that is described, it is not generally an equal relationship. As noted above, agency factors tend to play much more influential roles in effecting transfer than do invitational social conditions in these museum settings. This imbalance is anticipated in an observation by Billet et al. (2005) that:

> …the relationship between individual and social agency is not mutual or reciprocal, it is relational. Just as the social suggestion can be either weaker or stronger, so too can be individuals' engagement with a particular social suggestion (e.g. situated practice, cultural norm or cultural practice). The prospects for the coming together and contributions of the individual and social being enacted in equal parts or ways that are equally shared is quite remote. The very interactive processes arising will be individually unique in some ways, and individuals may be selective in their reading of a particular social suggestion or simply be unaware of it. (p. 5)

A key point of interdependence that appears somewhat equally reciprocal in these cases is the way in which museums shape workers' professional identity, passion and well-being, just as learners' growing expertise shapes the generally positive and creative cultures and outcomes of their museums. The nature of these museums motivates individual agentic transfer behaviours that, in turn, shape the nature and climate of the museum. Even though museums in these cases do not tend to integrate staff development in their developmental strategies, it is evident that their museological nature generates compelling expectations of effective professional practice. At the same time, practices in these museums are remade as learners introduce new learning and adapt it in largely subjective and self-directed ways. This seems aligned with Bierema's (2008) observation that "the emotional well-being of workers is a complex process that intersects with the organization culture, history, structure, policies, and politics" (p. 62).

Another notable example of interdependence is the way in which museum work in these settings creates expectations of creativity, just as museums workers value and exercise creative skills in their work. While it seems likely that museum work, by its nature, attracts creative workers, the ways in which creativity stimulates interest in new practices in museum settings deserves further research.

The interplay of positional autonomy and autonomous motivation and initiative also provides complex examples of ways in which relational interdependence among workplace and agency factors impact transfer in these case settings. On one hand, the goals and nature of the work assigned, the scope and authority of the position, and resources allocated by the museum define positional autonomy and the likelihood that the learner will engage in transfer activities. This is particularly notable, for example in the different levels of positional autonomy accorded to relatively solitary collections management positions relative to exhibition and management roles. On the other hand, individual workers' dispositions, personal levels of expertise and initiative, and their capacity to perceive affordances for the adaptation of learning emerge as critical variables in transfer experiences. Given the important role of autonomous motivation and initiative in animating transfer, each case demonstrates that a degree of positional autonomy is a necessary but not sufficient condition to introduce new practices.

Organizational and individual intentionality associated with learning and its transfer are also seen as interdependent (Billett, 2001a), in that while the individual engages in learning, the organization affords opportunities for the use of that learning. However, this study reveals a particular relational imbalance in this area. While these museum settings are receptive to new practices and three of the four put supports in place for largely self-initiated continuing professional development, they do not link participation in the CRM program — or most other CPE activities—with organizational goals or provide proactive supports for transfer. The lack of strategic organizational priorities for CPE places the onus on the learner to identify and pursue learning, and to recognize and act on affordances for the use of that specialized learning. To a certain extent these museums' reliance on workers' self-directed efforts to learn and introduce new practices is linked to the specialized nature of learners' expertise, in that professional specialization tends to limit the supervision exercised. In each case setting, learners note that in the absence of close supervisory support for and understanding of the content that is being brought into the museum setting, it is up to them to both initiate learning and to find or create opportunities for its use. Conversely, since these learners have been self-directed in their

decision to participate in CRM and in their choice of course, supervisors and managers have little understanding of the content and its potential to benefit the workplace.

Transfer dynamics that are distinctive in museum work

As noted at the outset, an underlying question in this study is the degree to which transfer dynamics in these case settings may differ from those observed through studies in the corporate and public services sectors, particularly since no studies have focussed in this particular area of practice. While it is not possible to define generalizable characteristics, the four case settings suggest that transfer experiences are subject to many of the same organizational and individual factors that are influential across all workplace settings. With reference to workplace climate, the implications of the size and complexity of the museum, and the degree to which CPE and transfer are intentionally supported are anticipated in the literature, as are the impacts of positional autonomy and the availability of affordances. With reference to individual agency, the variable influences of disposition and intentionality also are predicted in the literature. Accordingly, the literature of learning transfer has much to offer in building plausible explanations of learning transfer dynamics in these settings in particular—and in the museum sector more generally.

In Chapter 1, I speculated that as museum work is inherently linked with stewardship outcomes and involves professional and somewhat autonomous practice, these characteristics would contribute to distinctive transfer dynamics in these case settings. As anticipated, these themes played influential roles that can be further characterized in the following ways:

Stewardship orientation

The most obvious distinction between the corporate world and the museum sector with reference to transfer is the absence of a profit motive that translates to an interest in productivity, which in turn provides an instrumental rationale for learning transfer. Instead, museums in these case settings define their purpose according to social—rather than financial—performance expectations. A desire to make a difference in the quality of peoples' lives is noted in every museum setting. This social purpose is evident in the sense of passion and purpose that imbues discussions of transfer experiences. In each setting, learners talk about the inspirational quality of their practice, their enjoyment in working in collections, colleagues and the public, and their personal commitment to work in these rewarding settings, despite some frustrations associated with compensation or organizational management. This freely articulated emotional

connection to mission and purpose is seen to be unusual in discussions of workplace learning and transfer dynamics (Beatty, 2011; Sié & Yakhlef, 2009; Tran, 1998), and appears to create a positive dynamic that heightens the likelihood that new ideas are valued if they are perceived as relevant.

However, since a commitment to social outcomes imposes qualitative measures of returns on learning investments, this makes return on educational investment challenging to evaluate in these settings in systematic ways. Each case museum is highly focussed on the day-to-day work of collections, exhibitions and program development, working within broad plans that focus on stewardship outcomes and tasks. The four case settings do not articulate meaningful learning plans for their staff or set detailed learning or transfer goals. Indeed the absence of clearly articulated performance measures is lamented in the literature in all aspects of organizational management (e.g., Weil, 1996). Little attention is paid to setting or measuring goals for transfer of learning in these busy and distracted case settings since learning is not explicitly described or treated as an instrument for the achievement of stewardship goals.

Professionalism

While I anticipated that a commitment to professionalism at both organizational and individual levels would create receptivity for best practices, a number of more nuanced dimensions of professionalism emerged as influential in transfer in these settings. A notable dynamic across the four case settings is the degree to which norms and expectations of professional practice are articulated and regulated remotely from these workplaces by professional associations, by the parent agency, or by the First Nation partner. From a transfer perspective, the need to adhere to remotely articulated professional norms places an obligation on the learner to advocate for best practices that are not necessarily aligned with local museum priorities or policies. In each case setting, learners describe ideological and ethical tensions, along with self-directed transfer initiatives that arise from a personal commitment to high standards of professional practice.

Another notable aspect of professionalism in these case settings is the degree to which learners are expected to be self-directed within their areas of specialization. Each holds domain-specific knowledge, gained through both coursework and work experience, that tends to be unique within each organization as a result of job design. And each is expected to be self-directed in maintaining competence in this area. In several settings, supervisors indicate that

they lack the expertise to provide effective guidance on areas of specialized practice, thereby placing the onus on the learner to exercise judgement in learning and transfer needs. The distinctive influence of professional norms, commitments and expectations on transfer is noted as an under-researched area in all areas of professional practice (Daley, 2001; Yelon et al., 2004), and one that is clearly if differentially influential in these case settings.

Autonomy and initiative

Since I recognize that learners who participated in the Cultural Resource Management program tend to be motivated and self-directed learners with a commitment to professional practice, I anticipated that these qualities would be influential in their efforts to make use of their learning. However, I was struck by the degree to which both positional autonomy and autonomous motivation and initiative emerged from this study as particularly critical factors in learning transfer in these case settings.

As noted, autonomy is closely linked with professionalism since these learners are lightly supervised specialists and are expected to exercise considerable agency in planning for both day-to-day work and for the learning need to maintain competence. While these expectations are built into job design and supervisory relations, it was notable that each learner exercised autonomous motivation and initiative well beyond the requirements of the job in order to engage in learning and to make use of new concepts and practices in their work. This level and form of agency seems of particular importance in transfer in these museum settings as it is observed in every instance of complex far transfer. While positional autonomy positions the learner to act on affordances, these cases suggest that more self-directed efforts to make learning meaningful are important in achieving the high reported rates of transfer that emerge in each setting.

While I had also wondered if I would find links between developmental stage, autonomy and initiative, I did not find that my data supported any clear or distinctive patterns associated with museum practice. Instead, I noted that levels of autonomy and initiative seemed linked to mastery of conceptual, procedural and strategic skills that enhance learners' self-efficacy in pursuing challenging transfer goals. The more confident learners are in their ability to apply their learning, the more inclined they seem to behave in autonomous and agentic ways.

Other distinctive characteristics

While stewardship orientation, professionalism, and autonomy and initiative appear to be distinctive characteristics in museum transfer as predicted, four other unanticipated dynamics within various factors might be seen as influential in learning transfer in museums:

- **Passion**: As noted, each of the learners expressed a passion for their work in museums and for their capacity to make a difference in the communities. This level of commitment to their work seems linked to both disposition and motivation for transfer, and contributes to the initiative and perseverance needed to negotiate transfer challenges.
- **Creativity**: In each of the case settings, learners remarked that the creativity inherent in their work was stimulating and inspired them to take creative approaches to practice, as well as to the introduction of new knowledge and skills. Creativity enabled them to take innovative approaches to problem solving and to negotiate for the use of new practices.
- **External pressures to implement new practices**: Although the literature of learning transfer does not highlight expectations of new skills and knowledge from outside the organization as influential transfer factors, each case surfaces community expectations for service and partnership that help shape learning transfer dynamics. While these might be accounted for under pressures for change, contemporary expectations that museums are closely partnered with their communities suggests that the needs of such external agencies are a normal part of the dynamic of museum practice. In each case setting, learners discuss ways in which relations with communities shape their approaches to their practice and influence their attitudes toward the implementation of content from CRM courses, particularly as it relates to curatorial, research and programming processes.
- **A preoccupation with learning for collections and exhibitions content**: These busy knowledge-rich environments deal with constant demands for enhanced understanding of collections, exhibitions and program themes. This is explicitly noted in three of the four museums, and is evident in work orientations in all settings. When time and other resources are restricted, priority is given to learning about such content as opposed to museological practices.

Do these museum case settings create distinctive sites for learning transfer? While they have much in common with other organizations in terms of the interplay of climate and agency factors, it seems reasonable to conclude that their commitment to stewardship and public service and their professionalized nature, create circumstances that are not universally encountered in more profit-oriented settings.

Strengths and Limitations

As no prior research on the dynamics of learning transfer in museum contexts has been conducted, the rich, authentic voices of respondents in this study offer unique and valuable perspectives. Across all four settings, participants were enthusiastic, generous with their time, and thoughtful in their answers. Several commented that the opportunity to reflect on ways in which they use their learning has heightened their understanding of current and potential transfer dynamics, and they expressed appreciation that the study prompted reflective time in a busy schedule. The willing and frank participation of all those interviewed generated a wealth of data that has created a solid foundation for analysis and interpretation. This is further reinforced by the concurrence of interview participants on the content of thick descriptions. Almost all respondents expressed interest in and appreciation for the detailed descriptions of their workplaces and transfer dynamics, and two respondents commented:

> I read through the document and learned a lot about the museum and heritage sites and [our] direction. We discuss many things with different colleagues but don't always seem to have the whole picture. This [description] gave me a glimpse at the bigger picture and how others in this workplace view the process and possible outcomes in our shared work environment. Thank you for the opportunity to read this. While I realize it was research on your part, it actually gave us all some insight about the place we come to work every day and the people we work with as well. (Head Programmer, MHM, email correspondence, June 4, 2010)

> I did not see anything that needed to be corrected and came away feeling proud of our department and how we work…but most importantly how we work as a team, I know that we work well together but until you see it from someone else's perspective you don't really realize it,…for that I must thank you. (Aboriginal Programmer, MHM, June 4, 2010)

While the processes of gathering and reducing this data yielded valuable insights, I recognize that the following circumstances and limitations have shaped data collection, analysis and interpretation:

- **Limited capacity to accurately gauge either learning or transfer**: this qualitative study did not seek to systematically quantify the scope or frequency of learning, the transfer of learning, or the causal chains of evidence associated with step-by-step transfer activities. Instead, it strived to understand learners' perspectives on the successes and/or obstacles that they encountered in putting learning to work in meaningful ways. While respondents are enthusiastic in making such statements as: "I think all of it, whether…you use it immediately after learning it, or you go back to it [later], is useful" (Johnson, HDM, p. 33), there is no evidentiary basis for concluding that, indeed, *all* learning was transferred. They offered a range of specific instances of transfer to illustrate their experiences, but also make generalized statements about their experiences and perspectives. Actual causal chains and mechanisms are challenging to map, and transfer outcomes are difficult to measure in this relational and subjectively negotiated and self-reported phenomenon. However, it is evident from these comments that there is a strong perception that a substantial portion of content covered in CRM courses becomes meaningful in the workplace.
- **Passage of time:** this study explores learners' experiences and perspectives over extended periods. The accuracy of their recall of the nature of their learning, of their ability, capacity and motivations for the application of learning, and of the sequences of transfer events that they experienced, may be impacted somewhat by subsequent experiences and by their capacity to remember salient details.
- **Variance in participants' understanding and interpretation of questions and descriptions of experiences:** despite the systematic use of a protocol to guide both the semi-structured and more open-ended interviews, it cannot be assumed that participants held a common understanding of the matters in question or used consistent language to describe their experiences. For example, while one respondent might describe performance planning as a brief annual conversation with a supervisor, another might experience and describe performance planning as a regular monitored process of establishing work priorities linked with learning strategies. Learners' perspectives on aspects of content and practice, along with the level of detail they offer, vary accordingly. This seems particularly notable in discussions of the nature of the content that they found meaningful. Probing to clarify actions, values and assumptions that underlie statements, along with

triangulation with other interviews and with documentation, played an important role in bringing consistency to the analysis and interpretation of interview data. Ultimately however, interviews offer subjective views of learners' experiences in transfer and must be valued as such.

- **My biases:** despite my systematic efforts to approach data collection and analysis in a neutral fashion, my knowledge of and regard for the learners, my perspectives on their work environments, the nature of my questions, and my assumptions about the content of their studies inevitably influence my interpretations of how these are reflected in transfer dynamics.
- **Participants' reluctance to speak negatively about their organization/colleagues**: while respondents were frank about obstacles they encounter in accessing learning and putting it to work, they were largely positive about the roles that co-workers and supervisors play in this process. It is evident that most have amiable relations with their colleagues, and in some cases it seemed that transfer challenges presented in such relationships were not fully presented. This is in keeping with the research protocol, expressed both in writing and at the start of interviews, that discussion of the actions of colleagues who were unable to offer their own views would be discouraged. Accordingly, there are relatively few critical comments about the influence of supervisors and co-workers on the learning transfer processes in the data. In a few instances, participants expressed concerns in a circumspect manner or requested that frank observations be held in confidence.
- **Reticence to praise one's own actions:** just as CRM graduates were reticent in critiquing colleagues' influences on transfer, so they were somewhat reticent in praising their own efforts. Colleagues' observations are helpful in describing aspects of learners` efforts, creativity and perseverance in applying learning that they themselves were not inclined to highlight.
- **Power relations**: while respondents were generally frank and constructive about their experiences and perspectives, some requested confidentiality out of concern that their critiques of organizational or personal learning transfer dynamics could be either misconstrued or could result in harm to themselves or to others. These requests have been honoured, although doing so eliminates some data that illuminate transfer dynamics. .

Implications and Further Research

In Chapter I, I suggested that research that looks beyond participants' course satisfaction to examine the application of learning in museums has the potential to deepen understanding of learners and of museum workplace dynamics—and of our capacity as educators. In taking a particular focus on aspects of transfer associated with climate and agency for transfer, this study has highlighted a new area of research in the museum sector and offers insights with useful implications in several areas of museum practice—while also suggesting a wealth of further lines of enquiry.

As noted, this is the first study to look at transfer in the museum sector. As such, it brings the extensive but somewhat fragmented literature of learning transfer into the discourse of museum studies, and its four cases provide ample evidence of transfer dynamics that suggest that, in many ways, museums are similar to other workplaces in the ways that knowledge from continuing professional education makes transitions to practice. At the same time, these cases highlight a number of characteristics associated with museum climate and learners' agency that animate transfer in distinctive ways. Clearly, case participants perceive that involvement in the CRM program specifically, and continuing professional education more generally, offers meaningful outcomes for these learners and their workplaces. While it has not been a goal to quantify return on investment in this study, a general level of satisfaction is expressed with the outcomes of the time, funding and commitment dedicated to course participation. Within the limitations noted above, this study offers a broad and largely positive overview of the web of interdependent factors that enhance or inhibit transfer processes across the case settings.

In the following sections on study implications and further research associated with learners' agency, museum working climates, continuing professional education, the sector and learning transfer theory, I consider ways in which this study adds to the knowledge base of learning for museum professional practice and stimulates further lines of enquiry. My reflections on the implications of this research are, of course, somewhat tentative since these case study findings cannot be generalized to populations given their small samples, purposive sampling, and the challenges in controlling variables. My reflections here specifically relate to implications for these cases and their relevance to the thematic framework that shaped this study. The degree to which these findings and implications resonate with readers within their own settings however contributes to user generalizability (Merriam, 2001).

Learners' agency

On one hand, this study reveals that learners in each setting have played leadership roles in acquiring new knowledge and skills through the CRM program and in finding ways to make their learning meaningful in their workplaces. Their capacity, ability and motivation to engage in prolonged, complex and challenging transfer activities—and the satisfaction and benefit that result—attest to the importance and influence of these learners' agency. As such, these cases offer valuable insights that emphasize the under-researched importance of agency in museum professional practice

One the other hand, while learners and their colleagues in this study were engaged and thoughtful in their descriptions of transfer experiences resulting from CRM studies, they were are also frank in indicating that they have given little thought to learning transfer as an intentional process that can maximize the personal and organizational benefits that result from their learning activities. Some also comment that the opportunity to reflect on transfer through interviews has made them more self-aware and reflective of both their successes and ways in which they might be more strategic in ensuring that learning processes are meaningful in workplace contexts (Ramsden, 2009: 41; Johnson, email correspondence, February 8, 2010). Their accounts of serendipitous post-course transfer suggest that they are able to respond in intuitive and proficient ways as they perceive affordances. However, their reports of low levels of deliberative personal and museum-based goal setting suggest that their agency could be further strengthened by greater degrees of self-awareness and intentionality.

This has implications for these learners and their museums since this study demonstrates that the process of setting meaningful learning and transfer goals involves interdependent relations between the worker and the museum, particularly when content is not specifically linked to immediate workplace needs. The capacity to take more collaboratively intentional approaches to generalized learning and transfer from CPE seems linked to a mutual understanding of the dynamics of learning transfer and to the responsibilities that they jointly bear in developing and using professional knowledge to achieve the stewardship and service goals that define their practice. More specifically, this study suggests that these learners and their museums could strengthen agency for learning transfer by being more attentive to:

- goal setting and the development of strategic skills that allow learners to intentionally manage their involvement in learning and learning transfer processes;

- the ways in which learners' prior experiences, social context, professional identity and other values subjectively influence how they construe and construct learning from content addressed in continuing professional education activities;
- ways in which theory creates explanatory frameworks for practice;
- the interdependence—and tensions—among professional and organizational expectations and how learners are positioned to negotiate these; and
- the time-consuming and complex nature of much transfer and the innovation and perseverance that is often involved.

While these case studies provide a revealing first look at the important role of agency in animating learning and transfer, they also surface a wealth of questions for further research. This study suggests but does not establish causal linkages among agentic characteristics or how they specifically are enhanced or inhibited by workplace environments. More focussed research on the ways in which museum professional identity is linked to performance could help build more compelling cases for continuing professional education, as could research that explores factors that motivate agentic behaviours. What kinds of intrinsic and extrinsic rewards encourage professionals to exercise initiative and to persevere with learning and transfer in arduous situations? How does developmental stage influence agentic behaviour? And what kinds of strategic knowledge and skills further enhance agency to benefit both individuals and organizations? While professionals' subjective realities inevitably lead to diverse and complex answers to such questions, additional research that explores the current and potential contributions of museum professional education to this sector can enhance organizations which, after all, are comprised of people.

Case museums' climates for transfer

Both the recognition that transfer involves ongoing learning in these workplaces, and the absence of intentional supports for learning transfer in each of the four case settings suggest that these museums could realize benefits by being more attentive to how learning and transfer are strategically linked with museum goals, supported through policy and procedure, and integrated with practice. This finding has implications for all aspects of museum management in case settings, and for the learners who must negotiate these settings. At the organizational level it calls for greater appreciation of the interdependent ways in which organizational goals shape—and are shaped by—roles of and relationships with professional staff. The

organizational/individual dichotomy that is so commonly encountered in discussions of organizational dynamics masks the reality (particularly in large and complex museums) that an organization is, in large part, the sum of the people who collaborate to define and achieve organizational goals.

This study suggests that transfer in each of these settings could be enhanced by organizational attention to systematic staff and organizational development, and to the transfer processes involved in making learning meaningful. More specifically, these museums could explore the following aspects of their workplace climates to strengthen learning and transfer environments:

- the ways in which organizational structure, culture, systems, learning policies, resource allocation, and work design value and support—or inhibit—learning, transfer of learning, and learners' agency. Fuller and Unwin's (2004, 2011) continuum of expansive to restrictive learning environments offers a useful tool to assess conditions for workforce development;
- the ways in which responsibility and accountability for learning and transfer are shared in explicit and implicit ways between the museum and the learner. A key question is whether reality is consistent with the ideals set out in policy;
- the ways in which professional identity, expertise and sense of obligation influence learning and work ethics along with agency in transfer, and at times place the professional at odds with the museum and its goals or practices; and
- processes for establishing and monitoring performance expectations and measures of return on learning investments in the context of strategic and other forms of planning.

Just as there are a number of dimensions in which these museums might create more invitational and expansive conditions for learning and transfer, there are a number of areas in which further research might build understanding of returns on educational investments in the museum sector. For example, this study points to the strong sense of affiliation that museum professionals have for the nature and focus of their museum's mission and goals. A better understanding of how the specialized nature of museum roles and purposes shapes practice might clarify how professionals can be oriented and how they contribute in a reciprocal fashion to this critical area. These cases also indicate that learning environments can be restrictive in the absence of organizational efforts to link and support learning and organizational development

goals. What are the factors in museums that restrict learning, and how can these be mitigated to create more expansive approaches to developing effective workforces?

This study also highlights a role for more specific strategic planning linked with developmental planning that enables the museum and its employees to take set goals for learning and learning transfer. What kinds of planning and performance measures might offer sustainable, productive—and realistic—approaches in this area?

And finally, even as learners exercise notable agency in engaging in learning and introducing beneficial practices, how can museums and supervisors play more supportive and engaged roles as a means of building mutual commitments to best practices?

The Cultural Resource Management program

While the quality of learners' educational experiences in the CRM program has not been a primary focus of this study, the ways in which learners have engaged in and experienced their coursework is threaded throughout all the interviews. Accordingly a number of tentative implications for learning transfer can be suggested. As noted at the outset, specialists in museum continuing education, including those involved with the CRM program at the University of Victoria, tend to focus on the quality of the education they provide to support the acquisition of generalized knowledge and skills for museum best practices. However, this study reinforces the proposition that "formal preparation courses, by themselves, are not sufficient to produce long-term proficient practitioners" (Hager, 2011, p. 17). Given the finding that transfer in these case settings often involves complex subsequent learning to make learning from the CRM program meaningful, it follows that the CRM program could strengthen its approaches to 'teaching for transfer.' Although teaching for transfer is a topic that has attracted considerable attention in education for the workplace (e.g., Alexander & Murphy, 1999; Calais, 2006; Eddy & Tannenbaum, 2003; Hutchins, 2009; Illeris, 2009; Le Maistre & Pare, 2004; Marini & Genereux, 1995; Mestre, 2005; O'Neill, 2008; Schuetze, 2003) —and while the principles associated with experiential and transformational learning influence instructional design and pedagogy in the CRM program—explicit linkages, strategies and performance measures associated with transfer have not been discussed. The outcomes of this study suggest that CRM programmers could further strengthen the relevance of the program and its courses by utilizing instructional strategies that ensure that generalized content is highly relevant in diverse museum practice

settings. Learners' discussions of learning and transfer experiences suggest that such strategies might include:

- systematically consulting with both museums and learners to determine if curriculum is relevant to their situated needs;
- building relationships with both learners and their museums to encourage mutually beneficial goal setting, pre- and post-course transfer supports and understanding of ways in which learners and museums are interdependent;
- supporting learners' educational planning through advising that analyzes both personal and museum performance goals and matches these with appropriate content;
- relating content to practice through case studies and in-class and experiential learning activities which respect adult learners' subjective realities and challenge them to recognize how generalized learning must be adapted to serve their situated needs;
- recognizing the supports and challenges that learners encounter in the ongoing learning process of subsequently adapting content for use in situated museum settings;
- encouraging the development and use of meta-cognitive frameworks and strategic skills to reinforce ability, capacity and motivation for transfer, and explicitly discussing the roles that these play in mitigating challenges that learners will encounter in making use of generalized content in museum settings; and
- stressing the development and implications of professional identity. By supporting learners' understanding of and commitment to professional roles and obligations, the CRM program might enhance learners' motivation and capacity to be self-directed and to perceive and act on affordances in their museums and communities.

As well, CRM programmers and other educators could play more active roles in evaluating and sharing findings on the long-term impacts of continuing education for museum practice. This study suggests a range of questions related to teaching for transfer in the museum sector that call for further research. How can programs strengthen learners' agency for transfer and their strategic ability to negotiate complex situated workplace environments? What success measures are used to evaluate return on learning investments? What are the causal relationships among factors that tend to support and inhibit learning transfer in museum

settings and how can educators positively influence these? And how can educators anticipate and respond to the subjective and situated ways in which learners and their museums act to make content meaningful in practice? A more nuanced understanding of diverse ways in which learning is construed in the classroom and utilized in museum practice could help minimize the theory/practice divide.

Daley's (2000) recommendation to place the learner at the heart of continuing professional education reflects the learning and transfer experiences reported in this study and provides an important guideline for further research: .

> Our main challenge as CPE providers is to understand that transfer of learning and adoption of innovation are part of the knowledge construction process and an integral part of professional learning. Thus, when we view professional learning as constructivist and transformative, when we link both context and professional practice to learning, we have then situated and integrated a holistic rather than a segmented and partitioned view of knowledge development. (p. 41)

Professional associations

The reliance of these learners and their colleagues on the norms of professional behaviour provided by professional associations—whether these are completely external to the museum or embedded within its parent system—reveals the important role that arms-length organizations play in localized learning and transfer processes. Their influence on transfer plays out in a number of dimensions, from setting professional standards to providing funding, training, recognition, and guidelines that shape the nature of work.

While this study did not set out to evaluate the roles of professional associations in learning transfer, the pervasive influence of external expectations of practice that learners describe suggests that further enquiry could offer useful insights on the role of professional associations in learning transfer. For example, how does professional associations' capacity to articulate best practices, establish curriculum, advocate for emergent issues, build professional networks, fund developmental activities, and provide learning supports, influence both museum and individual identity and practice? While professional associations play critical roles in shaping professionalism and animating learning across the museum sector, no research has been conducted to gauge their scope and influence. A better understanding of the supports that individual workers in particular derive from professional associations would be of value in further appreciating how professional identity is formed and how agency is exercised. Such

research might also reveal ways in which professionals' ontological stances create tensions and challenges in adhering to westernized views.

Transfer propositions

Finally, this study has implications for transfer theory in that it reinforces socio-cultural theories about how learning makes transitions to the workplace, while also suggesting several transfer dynamics in the museum world that seem distinctive and that deserve further research. As noted in Chapter 1, this study was grounded in the core propositions that:

- Learning and transfer are dynamic, complex and developmental social processes that take place within the context of a recursive and mutually constitutive relationship between the learner and the workplace system (Beach, 1999; Daley, 2001; Hatano & Greeno, 1999; Parent et al., 2007; Stevenson, 2002).
- Knowledge, skills and attitudes for professional practice are subjectively constructed in the classroom environment from among multiple, competing ideas. The learner contextualizes new knowledge in terms of social and cultural subjectivities and prior personal and professional experience (Billett, 1996; Carraher & Schliemann, 2002; Greeno et al., 1996).

These propositions have been useful in encouraging me to view museums as complex and situated organizations, learners as subjective beings, and transfer as a process rather than a transaction. Even as they have guided my enquiry, case accounts of transfer experiences and the many perspectives on the influences of both agency and climate align solidly with these propositions and contribute nuanced data to the body of studies that explore learning transfer in diverse workplace settings. As noted throughout the cross-case comparisons and the discussion of findings, there are many instances in which transfer in the museum world is clearly influenced by transfer factors that are also influential in other sectors. The following table provides a brief synopsis of my findings relative to the commonly expressed propositions noted in Chapter 2 that offer insight on the phenomenon of transfer: .

Transfer propositions	Case Findings
Capacity for transfer is essential to competent performance (Alexander & Murphy, 1999).	Each setting offers evidence that learners' self-initiated learning and transfer activities are instrumental in developing their ability to be effective in both day-to-day performance and in career progression.
Capacity for transfer is influenced by the degree to which the learned knowledge, skills and attitudes are similar to those valued in workplace practices (Eraut, 1994; Haskell, 2001).	Accounts of transfer experiences on a near-to-far continuum offer evidence of ways in which capacity for transfer is contingent on needs, circumstances and similar practices in these museum settings.
The learner is influenced by complex workplace systems characterized by collective goal-oriented activity mediated by rules, regulations, tools, a division of labour, and the community. Since workplaces are inherently in tension as they balance competing interests and cope with change, they create conditions for learning (Blackler, 1995; Engeström & Kerosuo, 2006; Holton & Baldwin, 2003; Leberman et al., 2006).	While these learners are disposed to act in agentic ways in both learning and transfer, they are motivated or constrained by a diverse range of policies, supports, expectations, pressures for change and circumstances in their museums, as well as by the degree to which the museum provide affordances for the transfer of their self-initiated learning,
A range of interdependent factors related to personal and professional agency can enable and motivate the learner to selectively engage in transfer (Greeno et al., 1996; Pea, 1987).	Although each learner exercises agency, the nature of their agency varied according to ability, capacity and motivation. Common factors include a passion for museum work, a commitment to learning and autonomous motivation and initiative; divergent factors include degree of autonomy, levels of self-efficacy, and capacity to perceive affordances.
Workplace climate and affordances are influential in creating co-participative opportunities for the introduction, adaptation and long-term maintenance of learning from external sources (e.g., Beach, 1999; Billett, 1998, 2001b; Blackler, 1995; Greeno et al., 1996; Haskell, 2001; Holton, 2005; Leberman et al., 2006; Merriam & Leahy, 2005; Rouiller & Goldstein, 1993; Tuomi-Grohn & Engeström, 2003).	While each museum creates a receptive environment for museological practices that contributes to its specialized goals, it does not tend to offer highly supportive learning and transfer conditions. This is influential in that it places the onus on learners to initiate both learning and transfer activities. At the same time, since learners play a lead role in learning and transfer, museums do not hold a strong sense of ownership in these processes.

Table 16. Alignment with theoretical propositions

Even as these cases reinforce socio-cultural propositions associated with transfer, they also contribute to a more nuanced understanding of some of the transfer factors that comprise the thematic framework that I derived from the transfer and museum literatures to guide this study (Figure 2 in Chapter 1, Figure 3 in Chapter 2, and Figure 7 in Chapter 5). While each of the factors suggested in the literature played a somewhat predictable role in transfer in the case

settings, the significance and nature of that role was, to varying degrees, shaped by the specialized nature of museum practice, as noted in Figure 6 in this chapter. Given that this study offers initial highlights of transfer factors in a handful of case settings—rather than a definitive profile of museum transfer dynamics—more focussed research on a number of influential case-specific transfer dynamics offers the potential to further develop aspects of transfer theory:

- **The nature of museum as climates for transfer**: These cases emphasize that case study museums are shaped by an orientation to stewardship and public service, and that this orientation inspires and motivates workers and determines how their work is designed. As the literature is dominated by discussions of transfer in for-profit organizations, attention to ways in which other, more social, purposes influence transfer climate could offer a more balanced perspective on the nature of the organization as a transfer factor. How does the service and stewardship orientation and not-for-profit status of museums and other social service agencies shape the climate for learning transfer in ways that are distinct from for-profit organizations? And how are returns on educational investments measured when productivity and profitability are not the 'bottom line'? While this study indicates that learning is generally valued as a means of developing useful skills that contribute to stewardship and service goals, as well as a means of building morale, retaining staff, and rewarding them, how can museums articulate measures of success in learning and transfer that reflect their specialized nature?
- **Job design and level:** These cases suggest that the nature of museum work encourages learners to exercise agency to achieve high standards of practice in lightly supervised roles. How does the inherent creativity, professional and somewhat autonomous nature of museum jobs specifically impact transfer across the sector in distinctive ways?
- **Learners' dispositions, values and goals:** These cases highlight the strong commitment of these learners to self-directed learning and transfer activities. Do the dedication and passion that these learners express for their work play significant roles across the sector? How does professional identity and a sense of obligation to best practices influence museum workers' ongoing commitment to learning and transfer more generally? How does this compare to other professions?

- **External professional affiliations:** These cases highlight ways in which externally articulated norms and standards influence expectations for professional practice. What are the impacts of professional affiliations across the sector, and in workplace learning and transfer more generally?

While the cases in this study cannot be generalized, they prompt a number of important questions that relate to transfer dynamics both within the museum world and in workplaces more generally, In doing so they enhance the value of this study and the insights it offers in understanding learning transfer a an important means of strengthening professional practice.

Conclusion

My focus on learning that continues after participants leave the classroom illuminates how complex, situated, subjective, and meaningful continuing professional education can be — and how it continues to involve the learner and the museum long after the educator's work is done. As an initial enquiry into the dynamics of learning transfer, this study explores a range of largely positive learning transfer experiences within four case settings, and highlights the interdependent roles of museum climates and learners' agency in negotiating prolonged and complex processes of adapting learning to meet situated needs. Key findings include the influential roles that learners' mastery of content, positional autonomy, perception of affordances, dispositions, values and goals, initiative and professional affiliations play in initiating transfer in museum contexts that tend to be inspiring, rewarding, but benignly un-strategic in their efforts to support the transfer of learning from the Cultural Resource Management program.

At the outset of this dissertation I noted that part of my motivation in exploring transfer was to determine if we make a difference through our work in the CRM program. While the answer is clearly, 'yes', perhaps a better question going forward would be "how do we interact with learners and with museums to ensure that they are able to make learning meaningful?" This study offers an insightful basis for the further exploration of many lines of enquiry that arise from a discussion of learning transfer.

Bibliography

8Rs Research Team. (2004). *The future of heritage work in Canada*. Edmonton: University of Alberta.

AAM. (2002). Code of ethics for museums. Retrieved February 15, 2009

AAM. (2009). Professional development. Retrieved July 21, 2009

AAM. (2010). *Accreditation program annual statistics at-a-glance*. Washington, DC: American Association of Museums.

Aguinis, H., & Kraiger, K. (2009). Benefits of training and development for individuals and teams, organizations, and society. *Annual Review of Psychology, 70*, 451-474.

AHF. (2009a). *Arts and Heritage Foundation of St. Albert—Draft Strategic Plan 2010-2012*.

AHF. (2009b). Arts and Heritage Foundation of St. Albert website. Retrieved December 12, 2009, from http://www.artsheritage.ca/default.aspx

AHF. *Human resource management policy*. St. Albert, AB: Arts and Heritage Foundation of St. Albert.

Al-Alawi, A. I., Al-Marzooqi, N. Y., & Mohammed, Y. F. (2007). Organizational culture and knowledge sharing: Critical success factors. *Journal of Knowledge Management, 11*(2), 22-42.

Alexander, P. A., & Murphy, P. K. (1999). Nurturing the seeds of transfer: A domain-specific perspective. *International Journal of Educational Research, 31*(7), 561-576.

AMA. (2007). Museum affirmation program application form (pp. 14): Alberta Museums Association.

AMA. (2008). *Museum Affirmation Program: Guidelines*. Edmonton: Alberta Museums Association.

AMB. (2003). *Gwaii Haanas National Park Reserve and Haida Heritage Site Management Plan for the Terrestrial Area*: Archipelago Management Board.

Anderson, G. (Ed.). (2004). *Reinventing the museum: Historical and contemporary perspectives on the paradigm shift*. New York: Rowman & Littlefield Publishers, Inc.

Anderson, L. W. (2005). Objectives, evaluation, and the improvement of education. *Studies in Educational Evaluation, 31*, 102-113.

Anton, W. T. (1984). *The loss of linguistic capabilities in the transfer of learning from the training environment to the work environment in the United States Army.* Unpublished EdD.

Aoki, T. T. (1993). Legitimating lived curriculum: Towards a curricular landscape of multiplicity. *Journal of Curriculum and Supervision, 8*(3), 255-268.

Awoniyi, E. A., Griego, O. V., & Morgan, G. A. (2002). Person-environment fit and transfer of training. *International Journal of Training & Development, 6*(1), 25-35.

Axtell, C. M., Maitlis, S., & Yearta, S. K. (1997). Predicting immediate and longer-term transfer of training. *Personnel Review, 26*(3), 201-213.

Baharim, S. B. (2008). *The influence of knowledge sharing on motivation to transfer training: A Malaysian public sector context.* Victoria University, Melbourne.

Bailey, E. (2006a). The professional relevance of museum educators: Perspectives from the field. *Journal of Museum Education, 31*(3), 155-160.

Bailey, E. (2006). Researching museum educators' perceptions of their roles, identity, and practice. *Journal of Museum Education, 31*(3), 175-198.

Baldwin, T. T., & Ford, J. K. (1988). Transfer of training: A review and directions for further research. *Human Resource Development Quarterly, 41*, 63-105.

Bandura, A. (2001). Social cognitive theory: An agentic perspective. *Annual Review Of Psychology, 52*, 1-26.

Beach, K. (1999). Consequential transitions: A sociocultural expedition beyond transfer in education. *Review of Research in Education, 24*(1), 101-139.

Beach, K. (2003). Consequential transactions: A developmental view of knowledge propagation through social organizations. In T. Tuomi-Grohn & Y. Engestrom (Eds.), *Between school and work: New perspectives on transfer and boundary-crossing* (pp. 39-62). Amsterdam: Pergamon.

Bearman, D., & Geber, K. (2008). Transforming cultural heritage institutions through new media. *Museum Management and Curatorship, 23*(4), 385-399.

Beatty, B. R. (2011). Seeing workplace learning through an emotional lens. In M. Malloch, L. Cairns, K. Evans & B. O'Connor (Eds.), *The Sage handbook of workplace learning* (pp. 341-355). Los Angeles: SAGE.

Belling, R., James, K., & Ladkin, D. (2004). Back to the workplace: How organisations can improve their support for management learning and development. *Journal of Management Development, 23*(3), 234-255.

Benander, R., & Lightner, R. (2005). Promoting transfer of learning: Connecting general education courses. *Journal of General Education, 54*(3), 199-208.

Bentley, T. (2000). Learning beyond the classroom. *Educational Management & Administration, 28*(3), 353-364.

Bereiter, C. (1995). A dispositional view of transfer. In A. McKeough, J. Lupart & A. Marini (Eds.), *Teaching for transfer: Fostering generalization in learning* (pp. 21-34). Mahway, NJ: Lawrence Erlbaum Associates, Publishers.

Bierema, L. L. (2008). Adult learning in the workplace: Emotion work or emotion learning? *New Directions for Adult & Continuing Education, 2008*(120), 55-64.

Biklen, S. K., & Casella, R. (2007). *A practical guide to the qualitative dissertation*. New York: Teachers College, Columbia University.

Billett, S. (1996). Situated learning: Bridging sociocultural and cognitive theorising. *Learning and Instruction, 6*(3), 263-280.

Billett, S. (1998). Transfer and social practice. *Australian and New Zealand Journal of Vocational Education Research, 6*(1), 1-26.

Billett, S. (2001). Learning through work: Workplace affordances and individual engagement. *Workplace Learning, 13*(5), 209-214.

Billett, S. (2001a). Co-participation: Affordance and engagement at work. *New Directions for Adult & Continuing Education*(92), 63-72.

Billett, S. (2002). Toward a workplace pedagogy: Guidance, participation, and engagement. *Adult Education Quarterly, 53*(1), 27-43.

Billett, S. (2004). Learning through work: Workplace participatory practices. In H. Rainbird, A. Fuller & A. Munro (Eds.), *Workplace learning in context* (pp. 109-125). London: Routledge.

Billett, S. (2006). Work, subjectivity and learning. In S. Billett, T. Fenwick & M. Somerville (Eds.), *Work, subjectivity and learning: Understanding learning through working life* (pp. 1-20). Amsterdam: Springer Netherlands.

Billett, S. (2007). Exercising self through working life: Learning, work and identity. In *Identities at work* (pp. 182-210): Springer.

Billett, S. (2008). Learning through work: Exploring instances of relational interdependencies. *International Journal of Educational Research, 47*(4), 232-240.

Billett, S. (2010). The relational interdependence between personal and social agency in learning and for working life. In M. Van Woerkom & R. Poell (Eds.), *Workplace learning: Concepts, measurement, and application* (pp. 11-25). New York: Routledge.

Billett, S. (2011). Subjectivity, self and personal agency in learning through and for work. In M. Malloch, L. Cairns, K. Evans & B. O'Connor (Eds.), *The Sage handbook of workplace learning* (pp. 60-72). Los Angeles: SAGE.

Billett, S., & Smith, R. (2006). Personal agency and epistemology at work. In S. Billett, T. Fenwick & M. Somerville (Eds.), *Work, subjectivity and learning: Understanding learning through working life* (pp. 141-156). Amsterdam: Springer Netherlands.

Billett, S., Barker, M., & Smith, R. (2005, 3-5 March 2005). *Relational interdependence as a means to examine work, learning and the remaking of cultural practices.* Paper presented at the Learning Potential of the Workplace Conference, Twente University, The Netherlands.

Billett, S., Fenwick, T., & Somerville, M. (2006). Work, subjectivity and learning: Prospects and issues. In S. Billett, T. Fenwick & M. Somerville (Eds.), *Work, subjectivity and learning: Understanding learning through working life* (pp. 247-265). Amsterdam: Springer Netherlands.

Birkinshaw, J., Nobel, R., & Ridderstrale, J. (2002). Knowledge as a contingency variable: Do the characteristics of knowledge predict organization structure? *Organization Science, 13*(3), 274-289.

Blackbourn, C., Molnar, W., Fiori, P., & Gunn, K. (2002). *Guidelines for developing entry-level museum practice programs*. Toronto: The Learning Coalition.

Blackbourn, C., Molnar, W., Herrick, C., Fiori, P., & Matthew, M. (2004). *Improving performance through evaluation: A resource guide for museum training providers and managers*: The Learning Coalition.

Blackler, F. (1995). Knowledge, knowledge work and organizations: An overview and interpretation. *Organization Studies, 16*(6), 1020-1047.

Blackman, C. P., LaMaster, T. K., Roberts, L. C., & Serrell, B. (1988). *Open conversations: Strategies for professional development in museums*. Chicago: Field Museum of Natural History.

Boud, D., & Garrack, J. (Eds.). (1999). *Understanding learning at work*. London: Routledge.

Boylan, P. (2001). *Current trends in museum professional training: From museum curatorship to museum management.* Paper presented at the Joint Seminar of ICOM Committees for Management (INTERCOM), Museology (ICOFOM) and Training of Personnel (ICTOP), Barcelona.

Boylan, P. (2001a). *A revolution in museum management requires a revolution in museum training.* Paper presented at the Joint Seminar of ICOM Committees for Management (INTERCOM), Museology (ICOFOM) and Training of Personnel (ICTOP), Barcelona.

Boylan. (2006). The museum profession. In S. MacDonald (Ed.), *A companion to museum studies* (pp. 415-430). Oxford: Blackwell Publishing.

Bransford, J. D., & Schwartz, D. L. (1999). Rethinking transfer: A simple proposal with multiple implications. *Review of Research In Education, 24*(1), 61-100.

Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative Research in Psychology, 3*, 77 - 101.

Broad, M. L. (2007). Overview of transfer of training: From learning to performance. *Performance Improvement Quarterly, 10*(2), 7-21.

Broad, M. L. (Ed.). (2005). *Beyond transfer of training: Engaging systems to improve performance*: John Wiley and Sons.

Brown, J. S., Collins, A., & Duguid, P. (1989). Situated cognition and the culture of learning. *Educational Researcher, 18*(1), 32-42.

Burke, L. A., & Hutchins, H. M. (2007). Training transfer: An integrative literature review. *Human Resource Development Review, 6*(3), 263-296.

Caffarrella, R. (2002). *Planning programs for adult learners*.

Cairns, L., & Malloch, M. (2011). Theories of work, place and learning: New directions. In M. Malloch, L. Cairns, K. Evans & B. O'Connor (Eds.), *The Sage handbook of workplace learning* (pp. 3-16). Los Angeles: SAGE.

Calais, G. J. (2006). Haskell's taxonomies of transfer of learning: Implications for classroom instruction. *National Forum of Applied Educational Research Journal, 20*(3).

Cannizzo, J., Luna, M., & Watt, R. (1980). *Community in transition: A report on training needs and opportunities in British Columbia museums and galleries*. Victoria: British Columbia Museums Association.

Carliner, S., Ally, M., Zhao, N., Bairstow, L., Khoury, S., & Johnston, L. (2006). *A review of the state of the field of workplace learning: What we know and what we need to know about competencies, diversity, e-learning, and human performance improvement*: Canadian Society for Training and Development and the Canadian Council on Learning.

Carraher, D. W., & Schliemann, A. D. (2002). The transfer dilemma. *The Journal of the Learning Sciences, 11*(1), 1-24.

Cheng, E. W. L., & Ho, D. C. K. (2001). A review of transfer of training studies in the past decade. *Personnel Review, 3*(1), 102-118.

Chiaburu, D. S., & Lindsay, D. R. (2008). Can do or will do? The importance of self-efficacy and instrumentality for training transfer. *Human Resource Development International, 11*(2), 199-206.

Chiaburu, D. S., & Marinova, S. V. (2005). What predicts skill transfer? An exploratory study of goal orientation, training self-efficacy and organizational supports. *International Journal of Training & Development, 9*(2), 110-123.

Chima, J. (2005). *What's the utility of the case-study method for social science research? A response to critiques from the qualitative/statistical perspective.* Paper presented at the American Political Science Association, Washington, DC.

CHN. (2009). Council of the Haida Nation Website. from http://www.haidanation.ca/

CHRC. (2004). *Building on success: A human resources development strategy for the cultural sector*. Ottawa: Cultural Human Resources Council.

City of St. Albert. (2007). Arts and heritage stewardship agreement 2007-2012. In Cultural Services Department.

City of St. Albert. (2009a). Budget 2010: Cultural Services 2010 Business Plan and Operating Budget Highlights. Retrieved December 12, 2009

City of St. Albert. (2009b). Mayor's perspective: Downtown vision. City Council.

Clarke, N. (2002). Job/work environment factors influencing training transfer within a human service agency: Some indicative support for Baldwin and Ford's transfer climate construct. *International Journal of Training and Development, 6*(3), 146-162.

CMA. (1984). *Guidelines for writing a museum professional development policy*. Ottawa: Canadian Museums Association.

CMA. (1995a). *People, survival, change and success*. Ottawa: Canadian Museums Association Human Resources Planning Committee.

CMA. (1995b). *The workforce of the future*. Ottawa: Canadian Museums Association Human Resources Planning Committee.

CMA. (1999). Ethics guidelines. Retrieved July 21, 2009

CMA. (2009a). Canada's museums. Retrieved May 8, 2009, 2009, from http://www.museums.ca/en/info_resources/Canadas_museums/

CMA. (2009b). Human resource guidelines. Retrieved February 17, 2010, from http://www.museums.ca/en/info_resources/reports_guidelines/hr_toolkit/

CMA. (2009c). Museum definition. Retrieved October 12, 2009, from http://www.museums.ca/en/info_resources/reports_guidelines/museum_definition/index.php

Coetzer, A. (2007). Employee perceptions of their workplaces as learning environments. *Workplace Learning, 19*(7), 417-434.

Cole, C. (1996). *BCMA professional development review survey*. Victoria: British Columbia Museums Association.

Colquitt, J. A., LePine, J. A., & Noe, R. A. (2000). Toward an integrative theory of training motivation: A meta-analytic path analysis of 20 years of research. *Journal of Applied Psychology, 85*(5), 678-707.

COMPT-AAM. (2010). Committee on museum professional training standards and best practices guidelines. Retrieved March 31, 2010, from http://www.compt-aam.org/resources/standardsguidelines.html

Cranton, P. (1996). *Professional development as transformative learning*. San Francisco: Jossey-Bass Publishers.

Cree, V. E., & Macaulay, C. (Eds.). (2000). *Transfer of learning in professional and vocational education*. London: Routledge.

Cultural Human Resources Council. (2002). Face of the future: A study of human resource issues in Canada's cultural sector. Ottawa: CHRC.

Cunningham, J. B. (1997). Case study principles for different types of cases. *Quality and Quantity, 31*(4), 401-423.

Curry, D. H., Caplan, P., & Knuppel, J. (1994). Transfer of training and adult learning (total). *Journal of Continuing Social Work Education* Retrieved May 12, 2009

Daffron, S. R., North, M. W., & Doran, J. (2007). *Learning transfer: Lessons learned from professionals.* Paper presented at the Western Region Research Conference on the Education of Adults, Western Washington University.

Daley, B. (2001). Learning and professional practice: A study of four professions. *Adult Education Quarterly, 52*(1), 29-54.

Daley, B. (1999). Novice to expert: An exploration of how professionals learn. *Adult Education Quarterly, 49*(4), 133-147.

Daley, B. (2000). Learning in professional practice. *New Directions for Adult & Continuing Education, 2000*(86), 33-42.

Daley, B. (2002). Context: Implications for learning in professional practice. *New Directions for Adult & Continuing Education, 2002*(96), 79-88.

Davies, D. (1998). Beyond the boundary: The learner perspective in WBL. *Workplace Learning, 10*(3), 152-156.

Davies, M. (2007). *The tomorrow people: Entry to the museum workforce*: Report to the Museums Association and the University of East Anglia.

Davis, A. (2010). *Museum studies: Teaching, flexibility and curiosity.* Paper presented at the Museum Studies in the XXIst century: issues of studies and teaching, Saint Petersburg, Russia.

Davis, J. (2001). *Good intentions/complex realities: Perspectives on continuing professional education in Canada's museum sector*. Victoria: University of Victoria.

Davis, J. (2009). *Survey of CRM graduates' experience in knowledge transfer*. Unpublished manuscript.

Davis, J. (2009a). Cultural resource management program: Analysis of course evaluations. Unpublished report.(6 pp): University of Victoria.

Davis, J., Gurian, E. H., & Koster, E. (2004). Timeliness: A discussion for museums. *CURATOR, 46*(4), 353-361.

De Corte, E. (1999). On the road to transfer: An introduction. *International Journal of Educational Research, 31*(7), 555-559.

De Corte, E. (2003). *Powerful learning environments*: Emerald Group Publishing.

de Jong, T., & Ferguson-Hessler, M. G. (1996). Types and qualities of knowledge. *Educational Psychologist, 31*(2), 105-113.

Deci, E. L., Vallerand, R. J., Pelletier, L. G., & Ryan, R. M. (1991). Motivation and education: The self-determination perspective. *Educational Psychologist, 26*(3&4), 325-346.

Demos. (2003). *Towards a strategy for workforce development: A research and discussion report prepared for resource* (survey and interviews). London: Resource: The Council for Museums, Archives and Libraries.

Detterman, D. K. (1996). The case for the prosecution: Transfer as an epiphenomenon. In D. K. Detterman & R. J. Sternberg (Eds.), *Transfer on trial: Intelligence, cognition, and instruction* (pp. 1-24). Norwood, NJ: Ablex Publishing Corporation.

Detterman, D. K., & Sternberg, R. J. (Eds.). (1996). *Transfer on trial: Intelligence, cognition, and instruction*. Norwood, NJ: Ablex Publishing Corporation.

Dixon, N. (1999). Learning across organizational boundaries. In M. Easterby-Smith, L. Aráujo & J. G. Burgoyne (Eds.), *Organizational learning and the learning organization* (pp. 115-129): SAGE Publications.

Dreyfus, S. E., & Dreyfus, H. L. (1980). *A five-stage model of the mental activities involved in directed skill acquisition*. Oakland, CA: California University, Berkeley Operations Research Centre.

Dreyfus, S. E., & Dreyfus, H. L. (2005). Peripheral vision: Expertise in real world contexts. *Organization Studies, 26*(5), 779-792.

Eccles, J. S., & Wigfield, A. (2002). Motivational beliefs, values, and goals. *Annual Review of Psychology, 53*, 109-132.

Eddy, E. R., & Tannenbaum, S. I. (2003). Transfer in an e-learning context. In E. F. Holton & T. T. Baldwin (Eds.), *Improving learning transfer in organizations* (pp. 161-194). San Francisco: Jossey-Bass.

Edwards, A. (2010). *Being an expert professional practitioner: The relational turn in expertise*: Springer.

Egan, T. M., Yang, B., & Bartlett, K. R. (2004). The effects of organizational learning culture and job satisfaction on motivation to transfer learning and turnover intention. *Human Resources Development Quarterly, 15*(3), 279-301.

Eisner, E. W., & Dobbs, S. M. (1986). *The uncertain profession: Observations on the state of museum education in twenty American art museums*. Los Angeles: The Getty Center for Education in the Arts.

Ekos Research Associations Inc. in association with Lord Cultural Resources. (1988). *Labour market study in the museum sector: Final report*. Ottawa: Canadian Museums Association and the Department of Communications.

Ellstrom, P.-E. (2011). Informal learning at work: Conditions, processes and logistics. In M. Malloch, L. Cairns, K. Evans & B. O'Connor (Eds.), *The Sage handbook of workplace learning* (pp. 105-119). Los Angeles: SAGE.

Engeström, Y., & Cole, M. (1997). Situated cognition in search of an agenda. In D. Kirschner & J. A. Whitson (Eds.), *Situated cognition: Social, semiotic and psychological perspectives* (pp. 301-315). Mahwah, NJ: Lawrence Erlbaum Associates, Inc.

Engeström, Y., & Kerosuo, H. (2006). From workplace learning to inter-organizational learning and back: The contribution of activity theory. *Workplace Learning, 19*(6), 336-342.

Eraut, M. (1985). Knowledge creation and knowledge use in professional contexts. *Studies in Higher Education, 10*(2).

Eraut, M. (1994). *Developing professional knowledge and competence*. New York: Routledge.

Eraut, M. (2004). Transfer of knowledge between education and workplace settings. In H. Rainbird, A. Fuller & A. Munro (Eds.), *Workplace learning in context* (pp. 201-221). London: Routledge.

Eraut, M. (2009). Enabling learners to develop professional attitudes and capability: Curriculum design aid. Retrieved April 25, 2010

Eraut, M. (2010). The balance between communities and personal agency: Transferring and integrating knowledge and know-how between different communities and contexts, *Learning to be Professional through a Higher Education E-BOOK*: SCEPTrE.

Eraut, M. (2011). How researching learning at work can lead to tools for enhancing learning. In M. Malloch, L. Cairns, K. Evans & B. O'Connor (Eds.), *The Sage handbook of workplace learning* (pp. 181-197). Los Angeles: SAGE.

Eraut, M., & Hirsch, W. (2007). *The significance of workplace learning for individuals, groups and organisations*: ESRC Centre on Skills, Knowledge and Organisational Performance.

Evans, K., Guile, D., & Harris, J. (2011). Rethinking work-based learning: For education professionals and professionals who educate. In M. Malloch, L. Cairns, K. Evans & B. O'Connor (Eds.), *The Sage handbook of workplace learning* (pp. 149-162). Los Angeles: SAGE.

Facteau, J., Dobbins, G., Russell, J., Ladd, R., & Kudisch, J. (1995). The influence of general perceptions of the training environment on pretraining motivation and perceived training transfer. *Journal of Management Development, 21*(1), 1-25.

Falk, J. H., & Sheppard, B. K. (2006). *Thriving in the knowledge age*. Thousand Oaks, CA: Altamira Press.

Fenwick, T. (2006). Working, learning and adult education in Canada. In T. Fenwick, T. Nesbit & B. Spencer (Eds.), *Contexts of adult education* (pp. 187-197). Toronto: Thompson Educational Publishing, Inc.

Fenwick, T. (2008). Workplace learning: Emerging trends and new perspectives. *New Directions for Adult and Continuing Education*(119), 17-26.

Fenwick, T. (2010). Beyond individual acquisition: Theorizing practice-based collective learning in HRD. In M. Van Woerkom & R. Poell (Eds.), *Workplace learning: Concepts, measurement, and application* (pp. 26-40). New York: Routledge.

Field, J. (2005). *Social capital and lifelong learning*. Bristol: The Policy Press.

Finley Jr., K. W. (2005). E-learning and support for performance. In M. L. Broad (Ed.), *Beyond transfer of training: Engaging systems to improve performance* (pp. 207-229). San Francisco: John Wiley & Sons, Inc.

Flyvbjerg, B. (2006). Five misunderstandings about case-study research. *Qualitative Inquiry, 12*(2), 219-245.

Ford, J. K., & Weissbein, D. A. (1997). Transfer of training: An updated review and analysis. *Performance Improvement Quarterly, 10*(2), 22-41.

Fowler, C., & Lee, A. (2007). Knowing how to know: Questioning ˜knowledge transfer" as a model for knowing and learning in health. *Studies in Continuing Education, 29*(2), 181 - 193.

Frese, M. (2001). Personal initiative: The theoretical concept and empirical findings. In M. Erez, U. Kleinbeck & H. Thierry (Eds.), *Work motivation in the context of a globalizing economy* (pp. 99-109): Routledge.

Frese, M., Fay, D., & Garst, H. (2007). Making things happen: Reciprocal relationships between work characteristics and personal initiative in a four-wave longitudinal structural equation model. *Journal of Applied Psychology, 92*(4), 1084-1102.

Friedman, R. (1994). Museum people. The special problems of personnel management in museums and historical agencies. In K. Moore (Ed.), *Museum management*. London: Routledge.

Fuller, A., & Unwin, L. (2004). Expansive learning environments: Integrating organizational and personal development. In H. Rainbird, A. Fuller & A. Munro (Eds.), *Workplace learning in context* (pp. 126-144). London: Routledge.

Fuller, A., & Unwin, L. (2011). Workplace learning and the organization. In M. Malloch, L. Cairns, K. Evans & B. O'Connor (Eds.), *The Sage handbook of workplace learning* (pp. 46-59). Los Angeles: SAGE.

Fuller, A., Munro, A., & Rainbird, H. (2004). Conclusion. In H. Rainbird, A. Fuller & A. Munro (Eds.), *Workplace learning in context* (pp. 299-306). London: Routledge.

Fuller, N. J. (2005). Recognizing and responding to the knowledge needs of museums. *Museum Management and Curatorship, 20*, 271-276.

Garvin, D. A. (2000). *Learning in action: A guide to putting the learning organization to work*. Boston: Harvard Business School Press.

Gegenfurtner, A., Festner, D., Gallenberger, W., Lehtinen, E., & Gruber, H. (2009). Predicting autonomous and controlled motivation to transfer training. *International Journal of Training & Development, 13*(2), 124-138.

Gegenfurtner, A., Veermans, K., Festner, D., & Gruber, H. (2009b). Integrative literature review: Motivation to transfer training: An integrative literature review. *Human Resource Development Review, 8*(3), 403-423.

Genoways, H. H. (Ed.). (2006). *Museum philosophy for the twenty-first century*: Altamira Press.

George, A. L., & Bennett, A. (2005). *Case studies and theory development in the social sciences*. Boston: MIT Press.

Gibson, J. J. (1986). *The ecological approach to visual perception*. Hillsdale, NJ: Lawrence Erlbaum.

Gilley, J. W., & Hoekstra, E. (2003). Creating a climate for learning transfer. In E. F. Holton & T. T. Baldwin (Eds.), *Improving learning transfer in organizations* (pp. 271-303). San Francisco: Jossey-Bass.

Glaser, J. R., & Zenetou, A. A. (Eds.). (1996). *Museums: A place to work*. London: Routledge in association with the Smithsonian Institution.

Graham, I. D., Logan, J., Harrison, M. B., Straus, S. E., Tetroe, J., Caswell, W., et al. (2006). Lost in knowledge translation: Time for a map? *Journal of Continuing Education in the Health Professions, 26*(1), 13-24.

Greeno, J. G., Smith, D. R., & Moore, J. L. (1996). Transfer of situated learning. In D. K. Detterman & R. J. Sternberg (Eds.), *Transfer on trial: Intelligence, cognition, and instruction* (pp. 99-167). Norwood, NJ: Ablex Publishing Corporation.

Griffin, J., Baum, L., Blankman-Hetrick, J., Griffin, D., Johnson, J. I., Reich, C. A., et al. (2007). Optimizing learning opportunities in museums: The role of organizational culture. In J. H. Falk, L. D. Dierking & S. Foutz (Eds.), *In principle, in practice: Museums as learning institutions* (pp. 153-166). Lanham, MD: AltaMira Press.

Guile, D., & Young, M. (2003). Transfer and transition in vocational education: Some theoretical considerations. In T. Tuomi-Grohn & Y. Engestrom (Eds.), *Between school and work: New perspectives on transfer and boundary-crossing* (pp. 63-84). Amsterdam: Pergamon.

Guzman, G. A. C., & Wilson, J. (2005). The ''soft'' dimension of organizational knowledge transfer. *Journal of Knowledge Management, 9*(2), 59-74.

Gwaii Haanas agreement, Council of the Haida Nation and the Government of Canada (1993).

Hager, P. (2004). The conceptualization and measurement of learning at work. In H. Rainbird, A. Fuller & A. Munro (Eds.), *Workplace learning in context* (pp. 242-258). London: Routledge.

Hager, P. (2011). Theories of workplace learning. In M. Malloch, L. Cairns, K. Evans & B. O'Connor (Eds.), *The Sage handbook of workplace learning* (pp. 17-31). Los Angeles: SAGE.

Hager, P., & Hodkinson, P. (2009). Moving beyond the metaphor of transfer of learning. *British Educational Research Journal, 35*(4), 619-638.

Harteis, C., & Billett, S. (2008). The workplace as learning environment: Introduction. *International Journal of Educational Research, 47*(4), 209-212.

Haskell, R. E. (2001). *Transfer of learning: Cognition, instruction, and reasoning*. Biddeford, Maine: Academic Press.

Hatano, G., & Greeno, J. G. (1999). Commentary: Alternative perspectives on transfer and transfer studies. *International Journal of Educational Research, 31*(7), 645-654.

HDM. (2004). Strategic plan summary: High Desert Museum.

HDM. (2009). *Desert sage*. Bend, Oregon: High Desert Museum.

Herold, D. M., Davis, W., Fedor, D. B., & Parsons, C. K. (2004). Dispositional influences on transfer of learning in multistage training programs. *Personnel Psychology, 55*(4).

Hoadley, C. M. (2004). Methodological alignment in design-based research. *Educational Psychologist, 39*(4), 203-212.

Hodkinson, P., & Hodkinson, H. (2001, 5-7 December 2001). *The strengths and limitations of case study research.* Paper presented at the Making an Impact on Policy and Practice Conference, Cambridge.

Holmes, K. (2006). Experiential learning or exploitation? Volunteering for work experience in the UK museums sector. *Museum Management and Curatorship, 21*(3), 240-253.

Holton, E. F. (1996). The flawed four-level evaluation model. *Human Resource Development Quarterly, 7*, 5-21.

Holton, E. F. (2002). Theoretical assumptions underlying the performance paradigm of human resource development. *Human Resource Development International, 5*(2), 199-215.

Holton, E. F. (2003). What's really wrong: Diagnosis for learning transfer system change. In E. F. Holton & T. T. Baldwin (Eds.), *Improving learning transfer in organizations* (pp. 59-79). San Francisco: Jossey-Bass.

Holton, E. F. (2005). Holton's evaluation model: New evidence and construct elaborations. *Advances in Developing Human Resources, 7*(1), 37-54.

Holton, E. F., & Baldwin, T. (2003a). Making transfer happen: An action perspective on learning transfer systems. In E. F. Holton & T. T. Baldwin (Eds.), *Improving learning transfer in organizations* (pp. 3-15). San Francisco: Jossey-Bass.

Holton, E. F., & Baldwin, T. T. (Eds.). (2003b). *Improving learning transfer in organizations*. San Francisco: Jossey-Bass.

Holton, E. F., Bates, R. A., & Ruona, W. E. A. (2000). Development of a generalized learning transfer system inventory. *Human Resource Development Quarterly, 11*(4), 333-360.

Holton, E. F., Bates, R. A., Bookter, A. I., & Yamkovenko, V. B. (2007). Convergent and divergent validity of the learning transfer system inventory. *Human Resource Development Quarterly, 18*(3), 385-419.

Holton, E. F., Bates, R. A., Seyler, D. L., & Carvalho, M. (1997). Toward construct validation of a transfer climate instrument. *Human Resource Development Quarterly, 8*(2), 95-113.

Hooper-Greenhill, E. (2000). Changing values in the art museum: Rethinking communication and learning. *International Journal of Heritage Studies, 6*(1), 9-31(23).

Hooper-Greenhill, E. (2001). Museums and cultural politics, *American Association of Museums*. St. Louis, Missouri: University of Leicester, Department of Museum Studies.

HR Council. (2008). *Toward a labour force strategy for Canada's voluntary & non-profit sector*. Ottawa: Human Resource Council for the Voluntary & Non-profit Sector.

Hughes, C. (2004). The supervisor's influence in workplace learning. *Studies in Continuing Education, 26*(2), 275-287.

Hutchins, H. M. (2009). In the trainer's voice: A study of training transfer practices. *Performance Improvement Quarterly, 22*(1), 69-93.

ICOM. (2006). *Code of ethics for museums*. Paris: International Council of Museums.

ICOM. (2007). Museum definition. Retrieved May 3, 2011, from http://icom.museum/who-we-are/the-vision/museum-definition.html

ICTOP. (2008). *Curricula guidelines for professional development*: International Council of Museums, Unesco.

Illeris, K. (2004). A model for learning in working life. *Journal of Workplace Learning, 16*(8), 431-441.

Illeris, K. (2009). Transfer of learning in the learning society: How can the barriers between different learning spaces be surmounted, and how can the gap between learning inside and outside schools be bridged? *International Journal of Lifelong Education, 28*(2), 137-148.

IMLS. (2009). *Museums, libraries and 21st century skills*. Washington, DC: Institute of Museum and Library Services.

Irvine, L. (2008). *ICTOP curricula guidelines for professional development (draft)*: International Committee for the Training of Personnel.

Jacobs, R. L., & Park, Y. (2009). A proposed conceptual framework of workplace learning: Implications for theory development and research in human resource. *Human Resource Development Review, 8*(2), 133-150.

Janes, R. (1997). *Museums and the paradox of change: A case study in urgent adaptation*. Calgary: Glenbow Museum and the University of Calgary Press.

Janes, R. (2009). *Museums in a troubled world: Renewal, irrelevance or collapse?* Oxon: Routledge.

JHPIEGO. (2002). *Transfer of learning: A guide for strengthening the performance of health care workers*: JHPIEGO Project.

Jolliffe, L. (1984). *The mid-career training of museum professionals in Canada*. Ottawa: National Museums of Canada.

Kakabadse, N. K., Kakabadse, A., & Kouzmin, A. (2003). Reviewing the knowledge management literature: Towards a taxonomy. *Journal of Knowledge Management, 7*(4), 75-91.

Kavanagh, G. (1994). Introduction. In *Museum provision and professionalism* (pp. 1-12). London: Routledge.

Kelly, L. (2010). How web 2.0 is changing the nature of museum work. *CURATOR, 53*(4), 405-410.

Kii'iljus, B. W. (2009). A timeline showing some of the diseases that scourged the islands. *Haida Laas: The Journal of the Haida Nation,* p. 1.

Kii'iljus, B. W. (2009, March). Sometimes it's all right there. *Haida Laas,* p. 6.

Kii'iljus, B. W., & Harris, H. (2006). Tllsda x̲aaydas k'aaygang.Nga: Long, long ago Haida ancient stories. In D. W. Fedje & R. W. Mathewes (Eds.), *Haida Gwaii; human history and environment from the time of loon to the time of the iron people* (pp. 121-139). Vancouver: UBC Press.

Kii'iljus, B. W., Turner, N., & Collison, N. (2007). *From abalone to sprouceroot baskets: Haida trade and exchange in a dynamic economy*. Paper presented at the 30th Annual Conference of the Society of Ethnobiology, University of California, Berkeley.

Kirwan, C. (2009). *Improving learning transfer: A guide to getting more out of what you put into your training*. Farnham, UK: Gower Publishing Ltd.

Knowles, M. (1980). *The modern practice of adult education: From pedagogy to andragogy*. Englewood Cliffs: Prentice Hall/Cambridge.

Knowles, M. S., Holton III, E. F., & Swanson, R. A. (2005). *The adult learner: The definitive classic in adult education and human resource development*: Elsevier.

Knox, A. B. (1978). *Adult development and learning*. San Francisco: Jossey-Bass Publishers.

Knox, A. B. (2000). The continuum of professional education and practice. *New Directions for Adult & Continuing Education, 2000*(86), 13-22.

Kohli, A., Evans, P., Katzenstein, P. J., Przeworski, A., Rudolph, S. H., Scott, J. C., et al. (1995). The role of theory in comparative politics: A symposium. *World Politics, 48*(1), 1-49.

Kurylo, L. (2002). Issues in professional museum education, *Ontario Museums Association Evaluation of Professional Education*. Toronto: Ontario Museums Association.

Lane Jonah, A. M., Fougère, R., & Moses, H. (2009). A necessary luxury: Chocolate in Louisbourg and New France. In L. E. Grivetti & H.-Y. Shapiro (Eds.), *Chocolate* (pp. 329-343): John Wiley & Sons, Inc.

Lang, C., Reeve, J., & Woollard, V. (Eds.). (2006). *The responsive museum: Working with audiences in the twenty-first century*. London: Ashgate Publishing Ltd.

Lave, J., & Wenger, E. (1991). *Situated learning: Legitimate peripheral participation*. Cambridge: Cambridge University Press.

Le Maistre, C., & Pare, A. (2004). Learning in two communities: The challenge for universities and workplaces. *Journal of Workplace Learning, 16*(1/2), 44-52.

Leberman, S., McDonald, L., & Doyle, S. (2006). *The transfer of learning: Participants' perspectives of adult education and training*: Gower Publishing, Ltd.

Ledford, B. (2007). *Transfer of learning in continuing education programs: Perspectives of attorneys and other professionals.* Paper presented at the Western Region Research Conference on the Education of Adults, Western Washington University.

Lee, C., & Yang, J. (2000). Knowledge value chain. *The Journal of Management Development, 19*(9), 783-794.

Lehtinen, E. (2008). Discussion: Bridging the individual and social in workplace learning and motivation. *International Journal of Educational Research, 47*(4), 261-263.

Lemke, J. L. (1997). Cognition, context and learning. In D. Kirschner & J. A. Whitson (Eds.), *Situated cognition: Social, semiotic and psychological perspectives* (pp. 37-55). Mahwah, NJ: Lawrence Erlbaum Associates, Inc.

Lester, S. (2000). The professional accreditation of conservator-restorers: Developing a competence-based professional assessment system. *Assessment and Evaluation in Higher Education, 25*(4), 411-423.

Lim, D. H., & Johnson, S. D. (2002). Trainee perceptions of factors that influence learning transfer. *International Journal of Training and Development, 6*(1), 36-48.

Lobato, J. (2006). Alternative perspectives on the transfer of learning: History, issues, and challenges for future research. *Journal of the Learning Sciences, 15*(4), 431-449.

Lucas, L. M. (2005). The impact of trust and reputation on the transfer of best practices. *Journal of Knowledge Management, 9*(4), 87-101.

MacDonald, S. (Ed.). (2006). *A companion to museum studies*. Oxford: Blackwell Publishing.

Macleod, S. (2001). Making museum studies: Training, education, research and practice. *Museum Management and Curatorship, 19*(1), 51 - 61.

Malloch, M., Cairns, L., Evans, K., & O'Connor, B. (Eds.). (2011). *The Sage handbook of workplace learning*. Los Angeles: SAGE.

Marini, A., & Genereux, R. (1995). The challenge of teaching for transfer. In A. McKeough, J. Lupart & A. Marini (Eds.), *Teaching for transfer: Fostering generalization in learning* (pp. 1-20). Mahway, NJ: Lawrence Erlbaum Associates, Publishers.

Marini, A., & Genereux, R. (1995). The challenge of teaching for transfer. In A. McKeough, J. Lupart & A. Marini (Eds.), *Teaching for transfer: Fostering generalization in learning* (pp. 1-20). Mahway, NJ: Lawrence Erlbaum Associates, Publishers.

Martin, X., & Salomon, R. (2003). Knowledge transfer capacity and its implications for the theory of the multinational corporation. *Journal of International Business Studies, 34*(4), 356-373.

Marty, P. F. (2006a). Finding the skills for tomorrow: Information literacy and museum information professionals. *Museum Management and Curatorship, 21*(4), 317-335.

Marty, P. F. (2006b). Meeting user needs in the modern museum: Profiles of the new museum information professional. *Library & Information Science Research, 28*(1), 128-144.

Marty, P. F. (2007). The changing nature of information work in museums. *Journal of the American Society for Information Science and Technology, 58*(1), 97-107.

Marx, R. D., & Burke, L. A. (2003). Transfer is personal: Equipping trainees with self-management and relapse prevention strategies. In E. F. Holton & T. T. Baldwin (Eds.), *Improving learning transfer in organizations* (pp. 227-242). San Francisco: Jossey-Bass.

Matelic, C. (2007). *Organizational change in history museums.* University at Albany, State University of New York, Albany.

Matelic, C. (2008). Understanding change and transformation in history organizations. *History News, 63*(2, Spring), 7-13.

Matelic, C., & Brick, E. (1990). *Cooperstown conference on professional training: Needs, issues, and opportunities for the future.* Paper presented at the Cooperstown Conference on Professional Training, Cooperstown.

Mathieu, J., Tannenbaum, S., & Salas, E. (1992). Influences of individual and situational characteristics on measures of training effectiveness. *Academy of Management Journal, 35*(4), 828-847.

McCarthy, C., & Cobley, J. (2009). Museums and museum studies in New Zealand: A survey of historical developments. *History Compass, 7*(2), 395-413.

McKeough, A., Lupart, J., & Marini, A. (Eds.). (1995). *Teaching for transfer: Fostering generalization for learning*. Mahwah, NJ: Lawrence Erlbaum Associates, Publishers.

Merriam, S. B. (2001). *Qualitative research and case study application*. San Francisco: Jossey-Bass.

Merriam, S. B., & Leahy, B. (2005). Learning transfer: A review of the research in adult education and training. *PAACE Journal of Lifelong Learning, 14*.

Merriam, S. B., Caffarella, R. S., & Baumgartner, L. M. (2007). *Learning in adulthood: A comprehensive guide* (3rd ed.). San Francisco: Jossey-Bass.

Mestre, J. P. (Ed.). (2005). *Transfer of learning from a modern multidisciplinary perspective: Current perspectives on cognition, learning and instruction*: IAP.

Morris Baskett, H. K., & Marsick, V. J. (1992). Confronting new understanding about professional learning and change. Retrieved November 13, 2009

Murtonen, M., Olkinuora, E., Palonen, T., Hakkarainen, K., & Lehtinen, E. (2008). Motivational orientations in work. *International Journal of Educational Research, 47*(4), 213-222.

Museums Alberta. (2001). *Standard practices handbook for museums*. Edmonton: Museums Alberta.

Museums Association. (2008). Code of ethics. Retrieved July 21, 2009, from http://www.museumsassociation.org/ma/10964

Naquin, S. S., & Baldwin, T. T. (2003). Managing transfer before learning begins. In E. F. Holton & T. T. Baldwin (Eds.), *Improving learning transfer in organizations* (pp. 80-96). San Francisco: Jossey-Bass.

Naquin, S. S., & Holton III, E. F. (2002). The effects of personality, affectivity, and work commitment on motivation to improve work through learning. *Human Resource Development Quarterly, 13*(4), 358-376.

Nijman, D.J. M., Nijhof, W. J., Wognum, A. A. M. I., & Veldkamp, B. P. (2006). Exploring differential effects of supervisor support on transfer of training. *Journal of European Industrial Training, 30*(7), 529 - 549.

Nikandrou, I., Brinia, V., & Bereri, E. (2009). Trainee perceptions of training transfer: An empirical analysis. *Journal of European Industrial Training, 33*(255-270).

O'Neill, J. (2008). *Facilitating the learning transfer of nurses: A case study.* Unpublished M.Ad.Ed.

Parent, R., Roy, M., & St-Jacques, D. (2007). A systems-based dynamic knowledge transfer capacity model. *Journal of Knowledge Management, 11*(6), 81-93.

Parker, S. (2007). 'That is my job': How employees' role orientation affects their job performance. *Human Relations, 60*(3), 403-434.

Parks Canada. (1994a). Cultural resources management policy. from http://www.pc.gc.ca/eng/docs/pc/poli/princip/sec3.aspx

Parks Canada. (1994b). Performance evaluation. Fortress of Louisbourg.

Parks Canada. (2004). *Five-year review of the human resources management regime of Parks Canada: Final report*. Ottawa: Parks Canada Agency.

Parks Canada. (2005). *Parks Canada learning strategy*. Ottawa: Parks Canada.

Parks Canada. (2009a). Fortress of Louisbourg National Historic Site of Canada website. Retrieved January 12, 2010

Parks Canada. (2009b). Guiding principles and operating policies. In Parks Canada (Ed.).

Parks Canada. (2010). *Fortress of Louisbourg National Historic Site Management Plan: Rolling draft (for discussion)*. Louisbourg, NS: Fortress of Louisbourg.

Patton, W., & McMahon, M. (1999). *Career development and system theory: A new relationship* (Vol. 285). Toronto: Brooks/Cole.

Pea, R. D. (1987). Socializing the knowledge transfer process. *International Journal of Educational Research, 11*(6), 639-663.

Perry, C. (1998). Processes of a case study methodology for postgraduate research in marketing. *European Journal of Marketing, 32*(9/10), 785-802.

Potvin, R. (2007a). Methodology for conducting a web-based survey of museum professionals. Retrieved August 12, 2009

Potvin, R. (2007b). Working papers. Museum professional training and education: Results from a web-based survey. Retrieved August 12, 2009

Profile: Ernie Gladstone. (2008). *It's my day: Canada's Public Service eMagazine, Summer*, np

Pugh, K. J., & Bergin, D. A. (2006). Motivational influences on transfer. *Educational Psychologist, 41*(3), 147 - 160.

Raelin, J. A. (2008). *Work-based learning*. San Francisco: Jossey-Bass.

Rainbird, H., Fuller, A., & Munro, A. (Eds.). (2004a). *Workplace learning in context*. London: Routledge.

Rainbird, H., Munro, A., & Holly, L. (2004b). The employment relationship and workplace learning. In *Workplace learning in context* (pp. 38-53). London: Routledge.

Ramsden, A. (2005). Evaluation report for 'Curatorship' course at the University of Victoria (pp. 2): Musée Héritage Museum.

Resnick, L. B. (1989). Introduction. In L. B. Resnick (Ed.), *Knowing, learning and instruction: Essays in honor of Robert Glaser*. Hillsdale, NJ: Lawrence Erlbaum.

Roberts, L. C. (1997). *From knowledge to narrative: Educators and the changing museum*. Washington, D.C.: Smithsonian Institution Press.

Robinson, F. (2007). Conducting the museum: Training the next generation of directors. *Museum*(September/October), 33-35, 75.

Roosa, A. M., & Chin, P. L. (2002). *The AAM guide to writing an employee handbook*. Washington, DC: American Association of Museums.

Rouiller, J. Z., & Goldstein, I. L. (1993). The relationship between organizational transfer climate and positive transfer of learning. *Human Resource Development Quarterly, 4*(4), 377-390.

Royston, G., Suddaby, R., & Hinings, C. R. (2002). Theorizing change: The role of professional associations in the transformation of institutionalized fields. *The Academy of Management Journal, 45*(1), 58-80.

Ruge, A. (2008). *Museum professions—a European frame of reference*: International Council on the Training of Personnel (ICTOP).

Saljo, R. (2003). Epilogue: From transfer to boundary-crossing. In T. Tuomi-Grohn & Y. Engestrom (Eds.), *Between school and work: New perspectives on transfer and boundary-crossing* (pp. 311-322). Amsterdam: Pergamon.

Sandell, R. (2003). Social inclusion, the museum and the dynamics of sectoral change. *Museum and Society, 1*(1), 45-62.

Schlatter, N. E. (2008). *Museum careers: A practical guide for students and novices*. Walnut Creek, CA: Left Coast Press.

Schmitigal, K. (2005). Fellows survey summary (pp. 3), Smithsonian Fellowship in Museum Practice Program.

Schön, D. (1983). *The reflective practitioner: How professionals think in action*. London: Temple Smith.

Schön, D. (1987). *Educating the reflective practitioner*. San Francisco: Jossey-Bass.

Schuetze, H. (2003). *Integrating school- and work-based learning.* Paper presented at the Changing Face of Work and Learning Conference, Edmonton, AB.

Schunk, D. H. (2004). *Learning theories: An educational perspective* (4th ed.). Upper Saddle River, NJ: Pearson Prentice Hall.

Schwartzer, M. (2001). *Graduate training in museum studies: What students need to know*. Washington, DC: American Association of Museums.

Segger, M. (1976). *Report on training opportunities for museum workers in Canada*. Ottawa: Canadian Museums Association.

Segger, M. (1981). Standards and criteria for the training of Canadian museum workers. *Canadian Museums Association Gazette, 1981*(Winter/Spring), 20-25.

Senge, P. (1990). *The fifth discipline: The art and practice of the learning organization*. New York: Doubleday.

Sessa, V. I., & London, M. (2006). *Continuous learning in organizations: Individual, group and organizational perspectives*. Mahwah, NJ: Lawrence Erlbaum Associates, Publishers.

Sfard, A. (1998). On two metaphors for learning and the dangers of choosing just one. *Educational Researcher, 27*(2), 4-13.

Sié, L., & Yakhlef, A. (2009). Passion and expertise in knowledge transfer. *Journal of Knowledge Management, 13*(4), 175-186.

Simons, P. R. J. (1999). Transfer of learning: Paradoxes for learners. *International Journal of Educational Research, 31*(7), 577-589.

Slivac, B. F. (1988). Solving problems through the training of anthropological museum professionals. *Museum Anthropology, 12*(4), 14-22.

Stake, R. E. (2005). Qualitative case studies. In N. K. Denzin & Y. S. Lincoln (Eds.), *The Sage handbook of qualitative research* (3rd ed., pp. 443-466). Thousand Oaks, CA: SAGE Publications.

Stake, R. E. (2006). *Multiple case study analysis*. New York: The Guilford Press.

Stark, D. (2008). Mid-career professionals and museum leadership. *History News, 63*(3, Summer), 13-16.

Stark, R., Mandl, H., Gruber, H., & Renkl, A. (1999). Instructional means to overcome transfer problems in the domain of economics: Empirical studies. *International Journal of Educational Research, 31*(7), 591-609.

Starn, R. (2005). A historian's brief guide to new museum studies. *The American Historical Review*, from http://www.historycooperative.org/journals/ahr/110.1/starn.html

Statistics Canada. (2008). Table 1: Summary statistics for heritage institutions, by industry, Canada, 2006 and 2007. In H. I. S. Tables (Ed.). Ottawa: Statistics Canada.

Sternberg, R. J., & Frensch, P. A. (1996). Mechanisms of transfer. In D. K. Detterman & R. J. Sternberg (Eds.), *Transfer on trial: Intelligence, cognition, and instruction* (pp. 25-38). Norwood, NJ: Ablex Publishing Corporation.

Stevenson, J. (2002). Concepts of workplace knowledge. *International Journal of Educational Research, 37*(1), 1-15.

Studio Hansen Roberts, Aldrich Pears Associates, Bufo Inc., & Thomas Hacker Architects. (2005). *Interpretive master plan report: Renewing a framework for discovery*: High Desert Museum.

Subedi, B. S. (2004). Emerging trends of research in transfer of learning. *International Education Journal, 5*(4), 591-599.

Suchy, S. (2004). *Leading with passion: Change management in the 21 century museum*. Walnut Creek, CA: AltaMira Press.

Sun, P. Y.-T., & Scott, J. L. (2005). An investigation of barriers to knowledge transfer. *Journal of Knowledge Management, 9*(2), 75-90.

Szulanski, G. (1996). Exploring internal stickiness: Impediments to the transfer of best practice within the firm. *Strategic Management Journal, 17*, 27-43.

Szulanski, G. (1999). The process of knowledge transfer: A diachronic analysis of stickiness. *Organizational behavior and human decision processes, 82*(1), 9-27.

Tasse, A., & Hrimech, M. (2003). *Increasing learning transfer amongst newly trained employees: The role of the supervisor.* Paper presented at the Changing Face of Work and Learning, Edmonton, AB.

Taylor, A. (2003). *The context of school-work transition in Canada.* Paper presented at The Changing Face of Work and Learning Conference, Edmonton, AB.

Teather, L. (1991). Museum studies: Reflecting on reflective practice. *Museum Management and Curatorship, 10*, 403-417.

Teather, L. (2001). *Transforming museum studies: Educating museologists for cultural diversity.* Paper presented at the International Committee for the Training of Personnel (ICTOP) Conference, Barcelona.

Teather, L. (2008). Museum studies borderlands: Negotiating curriculum and competencies, *International Committee on the Training of Personnel*. Lisbon.

Teather, L., & Carter, J. (2010). Critical museology now. *MUSE, 27*(6), 22, 24, 26, 28, 30.

Teigland, R., & Wasko, M. (2009). Knowledge transfer in MNCS: Examining how intrinsic motivations and knowledge sourcing impact individual centrality and performance. *Journal of International Management, 15*(1), 15.

Thompson, G. N., Estabrooks, C. A., & Degner, L. F. (2006). Clarifying the concepts in knowledge transfer: A literature review. *Journal of Advanced Nursing, 53*(6), 691-701.

Tlili, A. (2008). *Efficiency and social inclusion: Implications for the museum profession.* Paper presented at the International Council on the Training of Personnel (ICTOP), Lisbon.

Tran, L. U., & King, H. (2007). The professionalization of museum educators: The case in science museums. *Museum Management and Curatorship, 22*(2), 131-149.

Tran, V. (1998). The role of the emotional climate in learning organizations. *The Learning Organization,* (5), 99-103.

Tuomi-Grohn, T., & Engeström, Y. (Eds.). (2003). *Between school and work: New perspectives on transfer and boundary-crossing*. Amsterdam: Pergamon.

Tuomi-Grohn, T., Engeström, Y., & Young, M. (2003). From transfer to boundary-crossing between school and work as a tool for developing vocational education: An introduction. In T. Tuomi-Grohn & Y. Engeström (Eds.), *Between school and work: New perspectives on transfer and boundary-crossing* (pp. 1-18). Amsterdam: Pergamon.

Turgeon, L., & Dubuc, É. (2002). Ethnology museums: New challenges and new directions. *Ethnologies, 24*(2).

UKCES. (2008). *The cultural heritage blueprint: A workforce development plan for cultural heritage in the United Kingdom*: UK Commission for Employment and Skills.

Velada, R., & Caetano, A. (2007). Training transfer: The mediating role of perception of learning. *Journal of European Industrial Training, 31*(4), 283 - 296.

Velada, R., António Caetano, Michel, J. W., Lyons, B. D., & Kavanagh, M. J. (2007). The effects of training design, individual characteristics and work environment on transfer of training. *International Journal of Training and Development, 11*(4), 282-294.

Vergo, P. (1989). *The new museology*. London: Reaktion Books.

Washburn, W. E. (1986). Professionalizing the muses. *Museum News, 64*(2), 18-25,70-71.

Watkins, K. E., & Marsick, V. J. (1993). *Sculpting the learning organization: Lessons in the art and science of systemic change*. San Francisco: Jossey-Bass Inc.

Webster-Wright, A. (2009). Reframing professional development through understanding authentic professional learning. *Review of Educational Research, 79*(2), 702-739.

Weil, S. (1988). The ongoing pursuit of professional status. *Museum News, 67*(2), 30-34.

Weil, S. (1990). In pursuit of a profession. In S. Weil, *Rethinking the museum & other meditations* (pp. 73-89). Washington DC: Smithsonian Institution Press.

Weil, S. (1996). The distinctive numerator. *Museum News, March-April*, 64-65.

Weil, S. (2002). From being about something to being for somebody: The ongoing transformation of the American museum. In S. Weil (Ed.), *Making museums matter* (pp. 28-52). Washington DC: Smithsonian Institution Press.

Wheatley, W. C. (2006). *Co-management of Gwaii Haanas National Park Reserve and Haida heritage site: Panarchy as a means of assessing linked cultural and ecological landscapes for sustainability.* University of Victoria, Victoria.

Wiesenberg, F. P., & Peterson, S. L. (2003). *Workplace learning as a field of inquiry: A Canadian-US comparison.* Paper presented at the Changing Face of Work and Learning, Edmonton, AB.

Woollard, V. (2006). An unsettled profession. In C. Lang, J. Reeve & V. Woollard (Eds.), *The responsive museum* (pp. 211-224). Aldershot, Hampshire: Ashgate.

Yamnill, S., & McLean, G. N. (2001). Theories supporting transfer of training. *Human Resource Development Quarterly, 12*(2), 195-208.

Yelon, S. L., & Ford, J. K. (1999). Pursuing a multidimensional view of transfer. *Performance Improvement Quarterly, 12*(3), 58-78.

Yelon, S. L., Sheppard, L., Sleight, D., & Ford, J. K. (2004). Intention to transfer: How do autonomous professionals become motivated to use new ideas? *Performance Improvement Quarterly, 17*(2), 82-103.

Yin, R. K. (2009). *Case study research: Design and methods* (4th ed.). Thousand Oaks, CA: SAGE Inc.

Zakreski, J. (2003). *Individual learners and the learning organization: Exploring the meaning of personal learning plan usage from the employee perspective.* Paper presented at the Changing Face of Work and Learning Conference, Edmonton, AB.

Appendices

- Appendix A: University of Victoria Human Ethics Review Certificate
- Appendix B: Research Protocol
- Appendix C: Surveys on Degrees of Autonomy and Initiative
- Appendix D: Case Coding
- Appendix E: Sample Thick Description – Fortress of Louisbourg

Appendix A: University of Victoria Human Ethics Review Certificate

University of Victoria

Human Research Ethics Board
Office of Research Services
Administrative Services Building
PO Box 1700 STN CSC
Victoria British Columbia V8W 2Y2 Canada
Tel 250-472-4545, Fax 250-721-8960
Email ethics@uvic.ca Web www.research.uvic.ca

Certificate of Approval

PRINCIPAL INVESTIGATOR:	**Joy Davis**	**ETHICS PROTOCOL NUMBER**	**09-366**
UVic STATUS:	**Ph.D. Student**	ORIGINAL APPROVAL DATE:	04-Nov-09
UVic DEPARTMENT:	**EDCI**	APPROVED ON:	04-Nov-09
		APPROVAL EXPIRY DATE:	03-Nov-10

PROJECT TITLE: **Putting Learning to Work: Knowledge transitions from continuing professional education to the museum workplace**

RESEARCH TEAM MEMBERS: None

DECLARED PROJECT FUNDING: **None**

CONDITIONS OF APPROVAL

This Certificate of Approval is valid for the above term provided there is no change in the protocol.

Modifications
To make any changes to the approved research procedures in your study, please submit a "Request for Modification" form. You must receive ethics approval before proceeding with your modified protocol.

Renewals
Your ethics approval must be current for the period during which you are recruiting participants or collecting data. To renew your protocol, please submit a "Request for Renewal" form before the expiry date on your certificate. You will be sent an emailed reminder prompting you to renew your protocol about six weeks before your expiry date.

Project Closures
When you have completed all data collection activities and will have no further contact with participants, please notify the Human Research Ethics Board by submitting a "Notice of Project Completion" form.

Certification

This certifies that the UVic Human Research Ethics Board has examined this research protocol and concluded that, in all respects, the proposed research meets the appropriate standards of ethics as outlined by the University of Victoria Research Regulations Involving Human Participants.

Dr. Rachael Scarth
Acting Associate Vice-President, Research

09-366 Davis, Joy

Certificate Issued On: 16-May-11

Appendix B: Research Protocol

Putting Learning to Work: Knowledge transitions from continuing professional education to the museum workplace

October 2009, with revisions in January 2010

TABLE OF CONTENTS

This protocol reinforces the validity and reliability of this enquiry in that it guides the logical, consistent and ethical collection of descriptive data for four cases that are designed to address the research questions posed in this dissertation. Content includes:

1. **Purpose of the Protocol**
2. **Research context**
   - 2.1. Background
   - 2.2. Research questions
   - 2.3. Theoretical frameworks
   - 2.4. Key definitions
   - 2.5. Timeline & stages
3. **Case characteristics**
   - 3.1. Context
   - 3.2. Comparative case approach
   - 3.3. Units of analysis
   - 3.4. Case structure, content and data sources
4. **Case participants**
   - 4.1. Case selection criteria and process
   - 4.2. Anonymity and confidentiality
   - 4.3. Informed consent
   - 4.4. Withdrawal policies and procedures
   - 4.5. Communications
5. **Validity**
   - 5.1. Construct validity
   - 5.2. Triangulation
   - 5.3. Member checking
6. **Reliability**
   - 6.1. Evidenciary chain
   - 6.2. Field notes
   - 6.3. Data recording
   - 6.4. Coding
7. **Data Types and Collection Proceaures**
   - 7.1. Documentary evidence
   - 7.2. Preliminary survey
   - 7.3. Interview logistics at case sites
   - 7.4. Interview protocols

Appendix A – Participant Consent Form

RESEARCH PROTOCOL[32]

1. PURPOSE OF THE CASE STUDY PROTOCOL

One of the primary benefits of case studies is their capacity to explore phenomena through in-depth exploration of participants' lived experiences. Descriptive data collection is therefore an inherently social and emergent process that calls for flexibility and openness to capture evidence of the subjective realities of those involved. However, to ensure that the insights gained through this process are aligned with and contribute to guiding theories, and to allow for valid and systematic comparisons across cases, guiding protocols play an important role in protecting the reliability and validity of case research (Yin, 2009). This document sets out the key questions, goals, concepts, participants, and evidence that shape this study, and describes the standardized policies, research instruments and procedures that guide its implementation.

2. RESEARCH CONTEXT

2.1 Background: this project is undertaken in the context of a doctoral dissertation to satisfy the requirements of the PhD Program in Educational Studies at the University of Victoria. It stems from my long-term interest in the experiences of graduates of the University's Cultural Resource Management Program as they seek to apply their learning within museum workplaces. While evaluations reflect a high degree of satisfaction with learning experiences throughout this 18.0 unit post-degree diploma program, we have no empirical evidence that the content learned through CRM studies is of use in graduates' practice. The literature of museum professional education is silent on the ways in which learning transfers from continuing professional education, although it consistently presents this form of learning for practice as a positive contribution to individual and organizational growth. The lack of evidence of the longer-term impacts of the continuing professional education in the museum sector limits our understanding of the holistic educational needs of museum professionals, and restricts discussion of returns on educational investments made by the student, workplace, sector, and university.

2.2 Research questions: this comparative case study project explores the experiences of selected CRM graduates in applying learning associated with socially engaged museum practice, thereby problematizing the general assumption that when professionals participate in continuing professional education coursework, the outcomes are consistently beneficial for both the learner and the workplace. Three research questions are posed:

- *What are the experiences of museum professionals as they seek to apply the concepts, principles and skills that they have gained through continuing professional education?*
- *How does their personal agency influence their inclination to put new knowledge to work?*
- *How do conditions in the workplace shape this process?*

[32] This protocol was prepared in October 2009 and approved in draft form by my Supervisory Committee. It was revised to a final draft after initial interviews at Musee Heritage Museum to refine questions. Footnotes are incorporated throughout this version to highlight variances between planned and actual implementation of research strategies.

2.3 Guiding theoretical frameworks: The initial research question regarding the nature of professionals' experiences as they seek to apply learning, establishes the overarching qualitative line of enquiry for this study within the context of two separate but complementary discourses. The discourse of museum studies, including sub-strands relating to museums' social purposes and continuing professional education, discusses the professional environment in which learning is being applied, and offers insight on the specialized characteristics and expectations of learning for socially engaged museum practice. The discourse of learning transfer provides an organizational and analytic framework for an exploration of learners' perceived efforts, successes and failures in applying learning from the classroom in museum workplace settings.

A guiding framework of learning transfer theories, applied within the context of discourse on continuing professional education for socially engaged museum practice, offers a number of propositions and constructs that organize the process of enquiry into the research questions. The core propositions include:

- conditions for transfer must be present if learning is to be applied in workplace settings
- learning transfer for professional practice is a social process that is shaped by the subjective realities of the learner and his/her environment
- a learner's personal agency and ability influence the likelihood of transfer, in concert with perceived opportunities in the workplace system.

By asking "*What are the experiences of museum professionals as they seek to apply concepts, principles and skills that they have gained through continuing professional education?*" the initial question initiates a broad enquiry into the transfer phenomenon that is informed by the first two of the propositions noted above. Considering and analyzing learners' experiences in the context of theoretical constructs that suggest that specialized and socially determined transfer dynamics are at play is expected to provide insight on the nature and implications of transfer experiences in museum workplaces.

The second and third questions, *How do conditions in the workplace shape these experiences*" and "*How does personal agency influence museum professionals' inclination to put new learning to work?*" focus particular attention on explanations for learning transfer that are suggested in the third core proposition. Since learning transfer theories formulated across a range of disciplinary perspectives emphasize the critical roles that both agency and workplace conditions play in facilitating transfer, exploring the ways in which these are influential in CRM graduates' experiences is expected to offer insight on a range of influential transfer factors that are external to the classroom.

By illuminating both the nature and implications of transfer experiences and the specific influences of learners' agency and workplace conditions, this study's guiding framework of learning transfer theories has the potential to contribute to the museum sector's understanding of the significance of a previously unexplored phenomenon in the development of knowledge and skills for museum professional practice. At the same time, the outcomes of this study have the potential to critique and expand upon the theoretical framework and contribute to its relevance for continuing professional education and for the museum and not-for-profit worlds.

The specific ways in which core theoretical propositions and associated constructs provide a basis for descriptive data collection strategies, including survey and interview questions, are addressed in Section 5: Validity.

2.4 Key definitions: The literatures that inform this study offer diverse perspectives on the nature of museum principles and practices and on learning transfer dynamics. These will be described in detail in Chapter 2, "Relevant Literatures." For the purposes of this study, the following definitions of important terms are utilized as a means of ensuring consistency in interpretation and of reinforcing construct validity. It is useful to note that the people interviewed may use key terms to convey somewhat different meanings than those noted below. It is also useful to note that, while many terms associated with learning and transfer are presented in diverse literatures as dichotomies (ie. training/education; formal/informal; situated/cognitive, near/far), meanings are often less bounded than terms suggest. The socio-cultural and interpretive paradigm that shapes this study situates many terms as divergent points on an integrative continuum that recognizes multiple realities and incremental, at time complementary, viewpoints.

This summary clusters terms associated with learning and transfer first in alphabetical order, followed by terms that related to museums and museum practice. Since a definition of learning transfer is addressed as a core concept in Chapter 1, no definition of this central concept is offered here.

Agency: Bandura (2001) states that "to be an agent is to intentionally make things happen by one's actions" (p. 2) and adds "to make their way successfully through a complex world full of challenges and hazards, people have to make good judgments about their capabilities, anticipate the probable effects of different events and courses of action, size up sociostructural opportunities and constraints, and regulate their behavior accordingly" (p. 3). Intentionality, forethought, self-reactiveness and self-reflectiveness are all noted as components of 'agentic' behaviour. While agency is normally discussed as an individual behaviour, it can also refer to organizational behaviour.

Continuing Professional Education: While continuing professional education (CPE) can include a wide range of formal and informal learning activities that are initiated by either the museum or the individual professional and are delivered in settings that range from the museum to the university, for the purposes of this study, CPE will normally refer to formal, structured, off-site work-related learning activities that contribute to both personal and professional development as well as to organizational performance. This definition is consistent with the structure and purpose of the Cultural Resource Management Program.

Learning: While there are many definitions of learning used throughout the literature of museum professional education and learning transfer, for the purposes of this study, I favour a socio-cultural perspective that holds that learning is a process by which the learner construes and constructs knowledge on the basis of personal and social contexts. Learning is therefore a participatory process, rather than a transactional one in which content is acquired (Sfard, 1998).

Practice: The term 'practice' is used throughout this study to denote the complex mix of activities involved in work in museum settings. As Edwards (2010) notes, "practices are knowledge-laden, imbued with cultural values and emotionally freighted by the motives of

those who already act in them" (p. 5). She goes on to reflect that practices are seen as collective, purposeful and open to change. Given the range of functional areas in the museum, practice is also bounded according to specialization. "Practice refers to the organization's routine use of knowledge and often has a tacit component, embedded partly in individual skills and partly in collaborative social arrangements" (Szulanski, 1996, p. 28)

Education: For the purposes of this study, education refers to formal engagement in a planned and generalized program of study that builds systematic conceptual, procedural and strategic knowledge to enhance professional practice.

Training: unlike education, training is seen as a learning event that is specifically linked with improved job performance. Chiaburu & Marinova cite Campbell & Kuncel, 2001 p. 278 in stating that training is "a planned intervention that is designed to enhance the determinants of individual job performance" (Chiaburu & Marinova, 2005, p. 111).

Workplace Affordances: These are considered to be specific opportunities and constraints that contribute to museum workplace climate in which learning may be applied. The term 'affordances' is drawn from cognitive psychology to describe action possibilities that are latent in the environment (Gibson, 1986) and is commonly used within the literature of transfer in workplace learning to describe organizational and working conditions that facilitate the application of learning. In keeping with Gibson's observation that, "affordances are properties taken with reference to the observer – they are neither physical nor phenomenal" (p. 143), Billett (2002), Greeno et al. (1996) and Tasse and Hrimech (2003) all emphasize that, while opportunities for the application of learning in workplace settings may exist, the learner's ability to perceive and respond to them is crucial.

Workplace Climate: Gilley and Hoekstra (2003) describes a climate for transfer as "perceptions describing characteristics of the work environment that may facilitate or inhibit the use of trained skills. These characteristics can include immediate supervisor's influence, the nature of employee attitudes toward training, and the extent of formal training policies and practices that exist to support training initiatives" (p. 272). Billett (2001) notes that an 'invitational' climate provides affordances for the transfer of learning.

Workplace Learning: Jacobs and Park (2009) offer a definition of workplace learning that reflects the dual interests of the individual and the museum workplace in the learning process: "We define workplace learning as the process used by individuals when engaged in training programs, education and development courses, or some type of experiential learning activity, for the purpose of acquiring the competence necessary to meet current and future work requirements. The definition assumes the need to balance, though not always equally, the needs of organizations, which provide the context for the learning, with the needs of individuals who may undertake the learning to advance their own work-related interests and goals" (p. 134).

Museum: This study recognizes that museums take multiple forms, in accordance with the Canadian Museums Association's definition that states that museums are:

"...institutions created in the public interest. They engage their visitors, foster deeper understanding and promote the enjoyment and sharing of authentic cultural and natural heritage. Museums acquire, preserve, research, interpret and exhibit the tangible and intangible

evidence of society and nature. As educational institutions, museums provide a physical forum for critical inquiry and investigation.

Museums are permanent, not-for-profit institutions whose exhibits are regularly open to the general public. This definition encompasses institutions that pursue similar objectives and accomplish most or some of a museum's functions. Accordingly, the following are also recognized as museums:

- Exhibition places such as art galleries and science and interpretation centers;
- Institutions with plant and animal collections and displays, such as botanical gardens, biodomes, zoos, aquariums and insectariums;
- Cultural establishments that facilitate the preservation, continuation and management of tangible and intangible living heritage resources, such as keeping houses and heritage centers;
- Natural, archaeological, ethnographic and historical monuments and sites. (www.museums.ca/en/info_resources/reports_guidelines/museum_definition//index.php);

Museum studies: "Museum studies" and "museology" tend to be used interchangeably to discuss the role, purpose and functional elements of museums. For the purposes of this study, "museum studies" is defined as the academic and practical analysis of the history, theory, research, professional development and functional practices of museums within social contexts. (Macleod, 2001; McCarthy & Cobley, 2009). This definition emphasizes the interdisciplinary nature of museum studies along with the integration and reciprocal influences of theory and practice. "Museology" is defined as a component of museum studies that specifically deals with the professional development of skills, knowledge and attitudes that comprise standardized professional practice.

Museum practice: As an integral component of museum studies, museum practice rests on theoretical foundations while also informing the ongoing development of theory. However specific museum practices are often situationally defined and tacit. Macleod (2001) provides a useful definition of museum practice that captures the degree to which it can vary from one museum setting to the next: "Museum practice refers to the negotiation of meaning which takes place on a day-to-day basis and which can be regarded as having a direct impact on museum outcomes. It refers to the repertoire of practices of those working in and for museums. The repertoires will differ from museum to museum as will the identities of those actively involved" (p. 57).

2.5 Project Stages and Timeline: it is anticipated that this project will be undertaken between September 2009 and October 2010[33], following the phases set out in Figure 2 noted below:

[33] Rather than finishing in October 2010, the end point for this project is expected to be Summer 2011 since the analysis and interpretation phases have taken longer than expected.

- Identification of case study informants, based on responses to the "Applying Cultural Resource Management Knowledge in the Workplace" survey (May-June, 2009); review and selection of final participants in the context of participation criteria (September 2009); identification and recruitment of colleagues, and supervisor(s) (November 2009).

- Application for Research Ethics Approvals, including draft questions (September/ October 2009)

- Finalization of open-ended and focused interview questions, and preparation of a interview protocol and guide (October 2009)

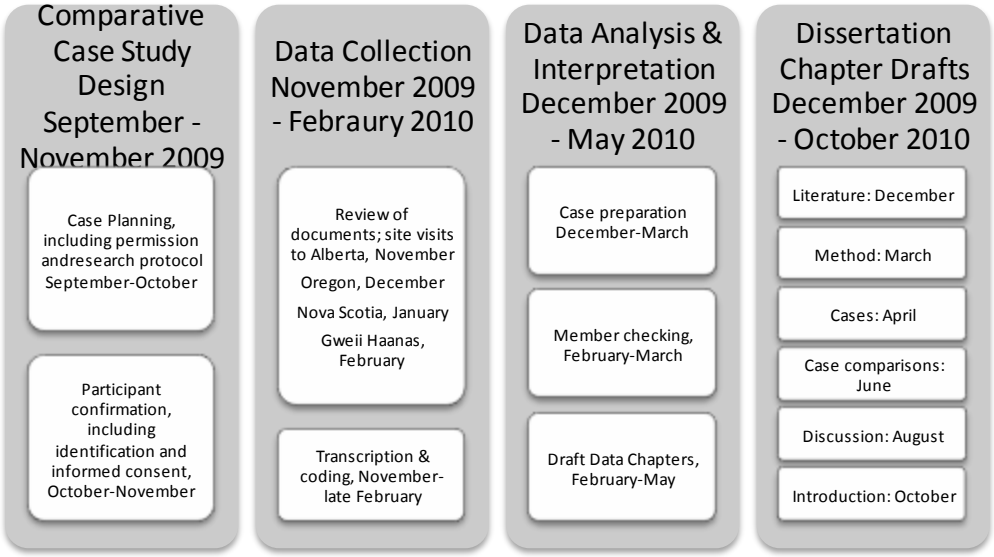
- Circulation of Participant Consent form to primary informant, along with request for recommendations on colleagues, supervisor and other persons who can be interviewed; email of Invitation to Participate and Participant Consent form to other informants; request for documentation, and finalization of site visits and interview schedules (November, 2009)

- Review of documentary evidence provided by informants in each of the case sites, prior to case site visits, to develop an understanding of the organizational context and job expectations for each case. (November, 2009 – February 2010)

- Site visits for day-long interviews with primary case informants and one-hour focused interviews with each of the colleagues and supervisor(s). (November, 2009 – February 2010)

- Data transcription, analysis and interpretation. (January – June 2010)

- Member checking by means of an online survey that enables each case group to review



the draft case and offer corrections and further information draft. (February – March 2010)

- Preparation of dissertation chapters. (November 2009 – October 2010

Figure 2: Project Stages and Timelines

3. CASE CHARACTERISTICS: Since a range of approaches to case study research are possible, this section describes the specific assumptions and characteristics that underlie the use of a case methodology in this project.

3.1 Philosophical Context: this project is grounded in a social constructivist worldview and uses qualitative methods to explore the varied and complex ways in which museum professionals develop subjective meanings of their experiences as they negotiate a transition from the classroom to the workplace. It builds on the assumption that the phenomena under study, and the research process itself, are socially constructed and interpreted by all involved. The intent is to better understand learners' subjective experiences through in-depth consideration of their socially determined goals, actions, and perspectives.

3.2 Case Approach: To explore the research questions in the context of museum professionals' lived experiences, I will use a comparative case study methodology that gathers in-depth evidence within the museum setting for four descriptive cases, through a preliminary survey, open-ended interviews with CRM graduates, interviews with selected colleagues and supervisors, and documents that provide background information on organizational structure and work design. The individual cases will be presented separately, followed by a thematic cross-case analysis.

3.3 Unit of Analysis: Each case will focus on a museum setting as its unit of analysis and the experiences and perspectives of the various participants in each museum setting will be treated as embedded units (Yin, 2009). Depending upon the nature and size of the museum case, the museum setting unit of analysis could be the entire museum or a functional work area within a museum.

3.4 Case Structure and Content: To facilitate the consistent development of descriptive data and cross-case comparisons of outcomes, each case description will feature similar structure and content[34]:

Case Components	Source of Evidence
Case background and context: this introductory section provides descriptive information on the nature of the museum setting, including its defining characteristics, role and purpose in the community, goals, size, staffing, resources and performance planning and professional development policies and procedures. Particular attention will be devoted to the degree to which the museum defines its levels of social/ community engagement.	Documentary materials including print and web-based promotional materials, mission and goal statements, strategic plan(s), organizational chart, organizational learning and professional development policies. Observations during the visit will also support the background description.
Primary participant characteristics: This section provides background information on the CRM graduate (CRMG), including prior	Documentary materials, including position description, resume and, if available, performance plans for the periods

[34] While these case study components are all addressed, both thick descriptions and case descriptions presented in Chapter 4 vary in minor ways from this projected layout. The relation between the content and the evidence however continues to be honoured.

education, time in professional practice and with the organization, professional specialization, and position description, roles and responsibilities.	during and after participation in the CRM program. These documents will be reviewed with the CRM graduate to ensure that they accurately portray the participant's personal and professional background.
Transfer experiences: This key section addresses the CRM graduate's reflections and perspectives on: • their motivation to undertake the Cultural Resource Management Program, and their overall reflections on its role in their career development • the degree to which coursework was influential in developing their understanding of socially engaged museum practice • the relevance of their learning to their practice • their personal motivation and ability to introduce new concepts and practices • instances in which they sought to apply new concepts and practices within the workplace, along with their observations on the supports and obstacles that they encountered in doing so • the factors that they perceive to be influential in applying knowledge in the workplace	Open-ended interview, based on the interview protocol included in Section 7.4: Interview Protocols. In preparation for the interview, the participant's responses to the "Survey of CRM Graduates' Experience in Knowledge Transfer" conducted in May-June 2009 will be reviewed and key outcomes will be on hand to serve as prompts within the interview process.
Workplace conditions for transfer: this section focuses on workplace conditions for transfer, including colleagues' reflections on: • the benefits of the CRMG's involvement in the CRM program • the perceived knowledge and skills that the CRM gained, with particular reference to socially engaged practice • the opportunities that existed within the workplace to apply new knowledge and skills • the degree to which the organization	Focused interviews, based on the interview protocol included in Section 7.4 Interview Protocols.

provides supports for the introduction of new knowledge and skills • the factors that tend to inhibit the introduction of new knowledge and skills • the ability of the CRMG to introduce new concepts and practices	
Summary: The final component of each case summarizes the key characteristics and knowledge transfer phenomena in the case, and presents an analysis o the factors that influenced the transfer of CRM graduates' learning within the museum setting. Reflection on the strengths and limitations of the case, the convergence of evidence, the reliability of inferences, and rival explanations for transfer phenomena are noted.	Descriptive data gathered through interviews and documentary materials

4. CASE PARTICIPANTS[35]

5. VALIDITY[36]

The quality of a case study project is judged by the measures it puts in place to ensure both validity and reliability. Since this case enquiry is qualitative in nature, its validity is measured in terms of its analytic generalizability to its guiding theoretical framework, as well as in terms of the clarity and reliability of the evidentiary chain.

5.1 Construct Validity: This study is undertaken within a guiding thematic framework that is defined as "a set of interrelated constructs, definitions, and propositions that presents a systematic view of phenomena by specifying relations among variables, with the purpose of explaining and predicting phenomenon." (Anfara & Mertz, 2006, citing Kerlinger 1986). A critical step in ensuring that the outcomes of the case study project can be generalized to its theoretical framework is the explication of core propositions and constructs as they relate to the research questions and data collection strategies. In designing a case protocol, Yin (2009) emphasizes the importance of clarifying the nature of information that must be extracted from the various descriptive data sources to properly address relevant propositions. In keeping with his guidelines, Level 2 Themes are those that should be addressed through research design, while Level 1 Questions are those that are posed to interview participants as a means of gathering relevant descriptive data in an unbiased and empathetic manner.

[35] As all aspects of case selection and measures to protect participants anonymity, confidentiality and other rights within the research process are addressed in Chapter 3, this section which largely duplicates this material, has been deleted.

[36] A synopsis of this section is presented in Chapter 3.

While learning transfer can be broadly defined as **"**the learning process involved when a person learns to use previously acquired knowledge/ skills/ competence/ expertise in a new situation" (Eraut, 2004, p. 212), the task of linking theoretical propositions and constructs with descriptive data collections strategies is complicated by the existence of diverse explanatory models for transfer. As Lobato (2006) notes, "the growing maturity of the field makes it necessary for researchers to clarify the phenomenon that they are investigating and provide a rationale for how the particular transfer definition and approach that is utilized fits the object of investigation" (p. 438). It is therefore important to specify the general characteristics of the study's cases and their participants as a means of clarifying the conditions that shape phenomena of learning transfer in these museum settings.

Museum practice is seen to be professional in the sense that it involves a commitment to public service, it has international, national and regional associations that deal with sectoral concerns, it has articulated the bodies of knowledge and best practices across its full range of occupational specializations, and is guided by standards of practice and codes of ethical conduct (Weil, 1988). However, unlike some professions, there is no personal accreditation to guide hiring practices, and expectations of educational preparation for practice vary widely across the sector. While autonomy is considered to be a hallmark of professionalism, most museum professionals work within a museum setting. To balance individual autonomy with organizational authority, museum associations tend to affirm in their codes of conduct that while museum professionals will normally adhere to organizational decision-making, the worker cannot be required to suppress his or her professional judgment in order to conform with a management decision (CMA, 1999).

Museum workplaces tend to be not-for-profit organizations or government agencies and their purpose and scope is defined by the nature of the cultural heritage resources they protect and present and by the audiences they serve. While their primary organizational performance measures relate to public education and heritage resource management, they face increasing pressures to generate earned revenues through a range of activities to sustain their public service roles. This creates a degree of internal tension as both the sector and individual museums seek ways to further strengthen socially engaged practice.

Participants in this study are adults who work in varied curatorial, educational and management specializations within diverse museum settings and base their practice on established standards and best practices, as well as considerable prior education and experience. As professionals, their work tends to involve variable 'open' skills or tasks (Yelon & Ford, 1999) that may not be closely supervised. They therefore tend to exercise considerable autonomous judgment in their day-to-day practice, within the context of overall procedural and strategic directions set by the organization. As adult professionals, it is likely that they are reflexive in both the learning and transfer processes (Leberman *et al.*, 2006).

While decisions made by CRM graduates to participate in the CRM program may be supported by their museums, learners themselves tend to exercise primary initiative and control in selecting the program and choosing delivery methods and elective topics (Davis, 2001, 2009). As the CRM program is a formal, academic continuing professional education program with a curriculum that reflects sectoral standards of practice and addresses emergent professional issues, it is independent of the workplace and its learning outcomes are not explicitly linked to organizational performance goals. The links between the CRM program and a museum's

practical needs are therefore negotiated between the learner and the workplace, rather than as a joint initiative with the CRM Program. And as learners consider the relevance of the conceptual knowledge and complex skill sets that underlie socially engaged practice, they grapple with philosophical and practical issues on both personal and museum levels, depending upon the degree to which such new and at times controversial practices are aligned with personal and organizational values and capacity.

These characteristics call for an explanatory approach to learning transfer phenomena that is relevant to cases in which experienced professionals are seeking to apply learned knowledge from external and personally initiated professional development to their somewhat autonomous practice within museum workplaces that have social outcomes rather than financial profit as their bottom lines. While various cognitive and organizational models of learning transfer contribute valuable and often complementary insights in this study, the models that offer the greatest explanatory power in the context of continuing education for museum professional practice are conceptualized from socio-cultural perspectives. These perspectives are grounded in an epistemological stance that is aligned with the interpretive orientation of this study and that provides a sympathetic investigatory framework for museum learning transfer phenomena:

- Learning and transfer are dynamic, complex and developmental social process that take place within the context of a recursive and mutually constitutive relationship between the learner and the workplace system (Beach, 1999; B. Daley, 2001; Hatano & Greeno, 1999; Parent *et al.*, 2007; Stevenson, 2002)

- knowledge, skills and attitudes for professional practice are subjectively constructed in the classroom environment from among multiple, competing ideas. The learner contextualizes new knowledge in terms of social and cultural subjectivities and prior personal and professional experience (Billett, 1996; Carraher & Schliemann, 2002; Greeno et al., 1996)

- the capacity to transfer learning is influenced by the degree to which the learned knowledge, skills and attitudes are similar to those in workplace practices (Haskell, 2001)

In the absence of a single broadly accepted theory that explains the transfer of learning from continuing professional education (Leberman et al., 2006; Merriam & Leahy, 2005), the exploration of research questions in this study is based on socio-cultural perspectives from a number of thoughtful and informed scholars who contribute complementary explanations in specialized areas. The following is a synthesis of commonly expressed propositions that are aligned with the phenomenon of transfer from continuing professional education:

- transfer from the classroom is contingent on the presence of appropriate social conditions for the adaptation and introduction of new knowledge, skills and attitudes in both the learner and the workplace (e.g., Beach, 1999; Billett, 1998; Blackler, 1995; Bransford & Schwartz, 1999; Broad & Phillips, 1997; B. J. Daley, 2000; De Corte, 1999; Greeno et al., 1996; Haskell, 2001; Holton, 2002; Leberman et al., 2006; Merriam & Leahy, 2005; Ottoson, 1997; Pea, 1987; Raelin, 2008; Szulanski, 1999; Tuomi-Grohn & Engeström, 2003)

- adult learning for professional practice serves and is shaped by personal development as well as organizational performance and problem-solving goals; these many not always be in alignment (Leberman et al., 2006; Sadler-Smith, 2006).

- learning and transfer are motivated by and influential in change processes (Leberman et al., 2006)

- knowledge, skills and attitudes learned through continuing professional education must be adapted, recontextualized and integrated to reinforce meaning (B. Daley, 2001) and to satisfy social, situated, culturally appropriate and goal-oriented practices within the workplace (Carraher & Schliemann, 2002; B. Daley, 2001; Evans, 2009; Lobato, 2006; Stevenson, 2002).

- the learner is a component of and is strongly influenced by a complex workplace social system characterized by collective goal-oriented activities that are mediated by rules and regulations, tools, a division of labour, and the community. Since activity systems are inherently in tension as they balance competing interests, they create conditions for learning and transformation (Blackler, 1995; Engeström & Kerosuo, 2006; Holton & Baldwin, 2003; Parent et al., 2007; Sessa & London, 2006; Stevenson, 2002).

- a range of interdependent variables or factors associated with workers' personal and professional agency are influential in enabling and motivating the learner to selectively engage in transfer activities within the recursive workplace system (Greeno et al., 1996; Pea, 1987).

- workplace climate and affordances are influential in creating opportunities for the introduction, adaptation and long-term maintenance of learning from external sources (Billett, 2001; Greeno et al., 1996; Holton, 2005; Rouiller & Goldstein, 1993).

Figure 3 depicts a model of transfer[37] from continuing professional education that indicates dynamic and interdependent relations among conditions involved in the transfer process.

[37] While this model was useful to me in conceptualizing my study, I did not reference it in further writing as I moved on to develop other models.

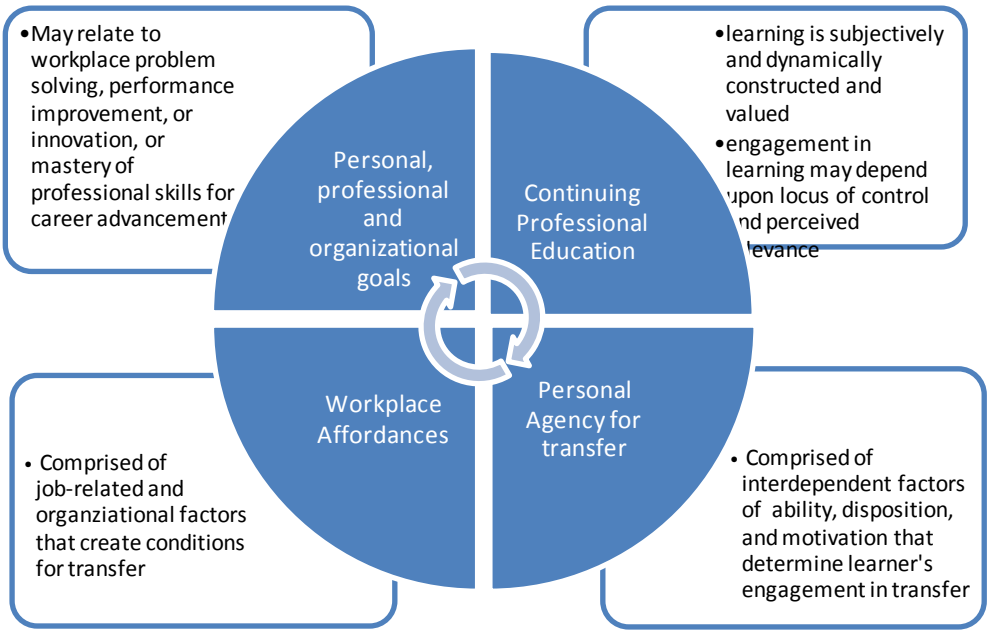


Figure 3: A Model of Learning Transfer from Continuing Professional Education to the Workplace

And finally, rather than focusing on ways of measuring rates of transfer which have dominated classic cognitive approaches to transfer, socio-cultural constructs focus on understanding the situated processes that learners engage in as they apply their learning. This approach is well-suited to the case study methodology with its capacity for in-depth study of learners' lived experiences. The following charts set out the linkages across the research questions, theoretical propositions and constructs, and relate these to the data collection strategies. More detailed accounts of the theoretical propositions and constructs will be provided in the dissertation.

Research Question	Theoretical Propositions	Constructs	Case Focus (Level 2 Objectives)	Level 1 Question Prompts – CRM Grads	Level 1 Questions – Colleagues/Supervisor	Documentary Evidence
1. What are the experiences of museum professionals as they seek to apply concepts, principles and skills that they have gained through continuing professional education?	• Transfer from the classroom only takes place when appropriate conditions for the introduction of new knowledge, skills and attitudes are in place. • Adult learning for professional practice serves personal development as well as organizational performance and problem-solving goals; these many not always be in alignment • Learning and transfer are motivated by and influential in change processes • Knowledge, skills and attitudes learned through continuing professional education must be adapted, recontextualized and integrated to reinforce meaning and to satisfy social, situated, culturally appropriate and goal-oriented practices within the workplace • The learner is a component of and strongly influenced by a complex workplace social system characterized by collective goal-oriented activities that are mediated by rules and regulations, tools, job design. Since workplace systems are inherently in tension as they balance competing interests, they create conditions for learning and transformation	• The model in Figure 3 suggests that transfer from continuing professional education is a dynamic process involving goal-directed personal and workplace components • Adult education theory suggests that most adult learners are self-directed and goal oriented, and contextualize their learning, and by extension their approaches to transfer, in prior experience, problems confronted in their environments, and their social roles (Leberman et al., 2006). This construct provides a framework for considering learners' experience in the transfer process. • A model of learning for the workplace (Illeris, 2004) indicates the reciprocal and interdependent influences of personal/professional and workplace goals and dynamics on learning.	These cases seek to understand the specific dynamics that museum professionals, as adult learners, have encountered in various museum settings as they seek to apply learning associated with professional practice. These cases also explore the degree to which graduates and their colleagues perceive transfer processes to be viable and successful.	• Request description of the graduate's position and role within the organization. • Enquire about pressures for change. • Discuss the learner's perspective on how their CRM participation is initiated, supported and perceived in the organizational context. • Enquire about specific instances in which learned knowledge and/or skills for practice were successfully applied. Was it to resolve a specific issue or problem? Who else was involved in the process? What changes were implemented? What tensions and obstacles had to be overcome? Was further learning required to see it through? How was success measured? What personal and organizational impacts resulted? Was this an unusual occurrence or was the learner successful in multiple transfer initiatives? • Explore the benefits and rewards that accrue from new practices.	• Please describe your formal and collegial relationships with XXX. • To what degree were you aware of and/or involved in planning for and supporting XX's participation in the Cultural Resource Management Program? • How did XX approach the introduction of concepts and practices gained from her studies? • In what ways did her involvement in the CRM program benefit your workplace? • I'm particularly interested in the ways in which XX's coursework around concepts of socially engaged practice are relevant and timely in your museum. By this I mean concepts that relate to greater community involvement in the work of the museum and efforts to make a positive difference in the quality of residents' and visitors' lives. Can you comment on the degree to which your museum has been shifting its practices to integrate these concepts? • How have XXX's contributions been influential in this area? • Does this fit within a specific strategic or performance plan?	• Organizational mission, goals, and strategic plans, organization charts, and policies and procedures provide evidence of the specific features and dynamics of the museum workplace and the leaner's position and roles within the system. • Policies and procedures associated with the learner's specific area of practice provide evidence of the detailed context in which the CRM graduate would be seeking to introduce change • Performance appraisals reflect on perceived effectiveness of the learner in the workplace.

Research Question	Theoretical Propositions	Constructs	Case Focus (Level 2 Objectives)	Level 1 Prompts – CRM Grads	Level 1 Questions – Colleagues/Supervisor	Documentary Evidence
2. How do conditions in the workplace shape these experiences?	Workplace climate and affordances are influential in creating opportunities for the introduction, adaptation and long-term maintenance of learning from external sources (Billett, 2001; Greeno et al., 1996; Holton, 2005; Rouiller & Goldstein, 1993)	Theories of organizational complexity (Broad, 2005), systems activity (Blackler, 1995; Engeström, 1989; Engeström & Kerosuo, 2006), and organizational receptivity to learning (Fuller & Unwin, 2004) explain ways in which workplace climate facilitates transfer. These theories also highlight associated dynamics of personal and organizational change in the process of learning transfer. Several constructs (Haskell, 2001; Holton, 2005) suggest workplace factors that interdependently influence transfer in positive and negative ways. Job related factors include: • position requirements • supervisory and peer supports • opportunity to apply learning • goal setting and performance planning • resource availability, including time Organizational factors include: • nature and culture • policies and procedures to support continuous learning and human resource development • fit of learning with organizational goals and priorities • pressures for change	This study seeks CRM graduates' perspectives on the nature of and degree to which various supports and obstacles in the workplace have been influential in their experience of learning transfer.	• Enquire about supports that are provided in the workplace for planning for and implementing the introduction of new practices. Explore the specific impacts of strategic goals and plans, supervisory and peer supports, organizational policies and procedures on transfer. What expectations does the workplace have when it initiates/supports CRM participation? • Explore learners' perceptions of constraints that prevent or inhibit their efforts to transfer knowledge, skills and attitudes, particularly with reference to socially engaged practice. Are values associated with this role influential in positive or negative ways? • Discuss learner's feelings regarding workplace affordances and constraints for transfer.	• What kinds of planning processes are used to develop and support change? • How does your organization identify needs for new practices to support change? • What kinds of policies, procedures and resources are in place to support individual and organizational learning activities? • What kinds of formal and informal expectations, incentives and rewards are in place to encourage the introduction of new practices? • Are there processes in the workplace that require or encourage the CRM graduate to share what they have learned through coursework? • How do supervisors, colleagues and work teams support the introduction of new practices? • What difficulties might XXX have encountered in applying new concepts and practices in the context of her position? In the context of the institution as a whole? Probes to highlight specific positive and negative aspects of workplace affordances may be used in these interviews. These may include queries relation to resources (time, money, staffing); fit with work priorities; lack of support or hostility to new practices.	Organizational mission, goals, and strategic, master and/or operational plans establish organizational context. Position descriptions and performance and training plans would provide evidence of specific planning and goal setting associated with learning activities

Research Question	Theoretical Propositions	Constructs	Case Focus (Level 2 Objectives)	Level 1 Question Prompts – CRM Grads	Level 1 Questions – Colleagues/Supervisor	Documentary Evidence
3. How does personal agency influence museum professionals' inclination to put new learning to work?	A range of interdependent variables or factors associated with workers' personal and professional agency are influential in enabling and motivating the learner to selectively engage in transfer activities within the recursive workplace system.	Many constructs suggest that learners' agency for transfer is comprised of dispositional qualities, ability, and motivation although they vary somewhat in their focus and emphasis. Since most constructs concur on the various factors, no single one plays a dominant guiding role. Instead, this study will consider evidence in terms of the broad range of factors proposed across various studies, as described in the dissertation. Factors are seen to be interdependent and may be selectively utilized in response to workplace affordances. Dispositional factors include: • Professional and job affiliation • developmental level • readiness for learning • interpersonal/communication skills Ability factors include: • perception of affordances • cognitive capacity • retentive capacity • prior knowledge and skills Motivational factors include: • achievement goals • interest • degree of autonomy/control • self-efficacy, and intentionality • intrinsic and extrinsic rewards • job-related utility of learning	This case seeks CRM graduates' perspectives on the nature of and degree to which various personal characteristics within dispositional, motivational and ability categories, have been influential in their experience of learning transfer	• Enquire about reasons why the learner participated in the CRM program and what she hoped to gain as a result. What were her expectations of personal, professional and job performance benefits? What pleasures and frustrations did the learner encounter in the learning process? • Inquire about personal or work-based learning and performance planning and the ways in which such processes helped to clarify organizational and personal learning and performance goals. How influential was the workplace in planning for and supporting her involvement in the CRM program? • Explore the ways in which the learner responded to concepts of socially engaged practice. Were these aligned with the learner's values and interests? Were they transformational? How motivated was the learner to apply these in the workplace? • How relevant were these concepts to the job and to the organization? What specific opportunities for transfer existed? • Inquire about the degree to which the learner felt confident in their knowledge, ability and role within the organization to introduce new practices. • Explore the learner's positive and negative feelings and perceptions about their capacity to introduce new practices	Please comment on your perceptions of XX's strengths in introducing new practices.	An individual performance plan may provide evidence of goal setting.

5.2 Triangulation: As interviews are verbal reports that "are subject to the common problems of bias, poor recall, and poor or inaccurate articulation" (Yin, 2009: 108) the information presented in documents and across various interviews will be triangulated as much as possible in order to reinforce the accuracy of accounts of transfer experience.

5.3 Member checking: To ensure that the case studies accurately represent the experiences and perspectives of the participants, each will have an opportunity to corroborate the case description and/or to suggest clarifications and changes to the evidence that is presented in the write-up. Their comments on the interpretation of data may also be considered and integrated. To seek this feedback, each participant will receive a copy of the draft case and will be asked to provide their feedback through a brief survey conducted online using Surveymonkey software.

6. RELIABILITY

In order to ensure the reliability of descriptive data collection, transcription and analysis processes, a range of measures are put in place that contribute to consistency and minimize errors and bias. This protocol serves as an important means of approaching each case in a uniform manner. Consistent approaches to data management are also important in reinforcing reliability.

6.1 Evidentiary Chain: Systematic application of this protocol, consistent use of defined terms, and detailed field notes on the data collection will reinforce the accuracy, consistency and trackabilty of the evidence gathered. Consistent coding in the analysis process will help ensure that evidence and constructs are appropriately linked.

6.2 Field Notes: A journal which documents interview logistics, details, procedures, anomalies, deviations from the interview protocol, and observations for each interview will be maintained.

6.3 Data Recording: Each interview will be recorded using a digital audio recorder. These files will be stored within the NVivo software where pertinent sections will be transcribed and coded. Back up audio files will be stored on a password protected external hard drive.

6.4 Coding[38]: An initial coding protocol is used to capture information relating to the following themes. These are currently being used as a means of organizing theory, propositions, constructs and other background information from relevant literatures:

- Evaluation of learning impacts (this category is primarily used for analysis of the literature)
- Museum Characteristics
- Museum Professional Education
- Learning for the Workplace
- Learning Transfer Dynamics

[38] See Appendix D for the full coding protocol

- Learning Transfer Factors
- Individual Case Outcomes

It is assumed that the addition of coded case study data will fit within these codes. However, as this is an emergent study, it is likely that additional coding categories will be added as data is reviewed.

7. DATA TYPES AND COLLECTION PROCEDURES

In keeping with Yin's (2009) contention that the validity and reliability of cases can be strengthened through the use of multiple sources, this study collects the following types of descriptive data, which can be triangulated to corroborate various aspects of the transfer phenomenon:

7.1 Documentary evidence: interview data will be augmented and corroborated by analysis of a range of pertinent documents. Approximately four weeks prior to each site visit, the CRM graduate will be asked to assemble the following materials and send them to me in print or electronic formats:

Organizational information, including past and current materials as appropriate to reflect organizational changes that have occurred during and subsequent to the CRM graduate's participation in coursework

Print and/or electronic promotional and other information on the museum and on the functional area(s) in which the CRM graduate works. Where there is a considerable volume of such materials, a sample that conveys the nature of the institution and the scope of it programs will be requested.

- Past and current museum mission and goals
- Strategic plan(s)
- Organizational structure, indicating the CRM graduate's current and past positions
- Policies and procedures associated with professional development and organizational learning
- Personal Information, including past and current materials that reflect personal and position changes that have occurred during and subsequent to the CRM graduate's participation
- Position description(s)
- Resume
- Performance and professional development plan(s)
- Any other materials that describe the CRM graduate's roles and responsibilities in the organization

Should any of the materials be missing, I will check with CRM graduates to determine if such a document exists within the context of their museums. Depending upon the size and scope of the museum, it is expected that documents will range in their availability and scope.

7.2 Preliminary Survey Data: as each of the cases was identified through the "Survey of CRM Graduates' Experience in Knowledge Transfer" conducted in May-June 2009, the responses submitted by CRM graduates are available to serve as prompts in the open-ended interviews.

7.3 Interview Logistics at Case Sites – the primary source of data for case development are interviews with the CRM graduate and their colleagues and supervisor(s) at each site. To conduct these interviews in a consistent and effective manner, the following field procedures will be observed:

- **Site permissions and access** – Access to the proposed sites is crucial to conduct the cases. This includes permission to spend approximately one working day with the CRM graduate, and approximately one hour with up to five colleagues and supervisors. Convenient and private meeting space is also desirable; if it is unavailable, alternate arrangements in an adjacent meeting space will be arranged to ensure the privacy and confidentiality of interviews. As part of the participant recruitment process, institutional permission to conduct case development and interact with staff will be obtained prior to each visit. The following specific permissions have been put in place:

    - **Musée Heritage Museum**, St. Albert, Alberta: the Executive Director, who is also the CRM graduate, has sought and received permission from the Board of Directors to participate in this study and has communicated this to me by email. This permission includes staff and site access. The site visit is scheduled for November 23-25, 2009.

    - **High Desert Museum**, Bend, Oregon: the Director of the High Desert Museum has confirmed that the Museum is willing to participate in this study. This has been communicated to me by the CRM graduate. I will write to confirm this arrangement as soon as the Certificate of Approval is confirmed by the University of Victoria's Human Research Ethics Review Board. This permission includes staff and site access. The site visit is scheduled from November 30 – December 2, 2009.

    - **Fortress of Louisberg National Historic Site,** Louisberg, Nova Scotia: In keeping with Parks Canada research protocols, I have submitted a Research Permit application to conduct this project at both Fortress of Louisberg and Gwaii Haanas. I have received the permit from Fortress of Louisberg, which allows access to both the site and staff. The site visit is scheduled from January 12-14, 2010.

    - **Gwaii Haanas National Park Reserve and Haida Heritage Site**, Queen Charlotte City, British Columbia: As noted above, an application for a Parks Canada Research Permit has been submitted.[39] If and when this is confirmed, a site visit will be scheduled in February 2010.

[39] It was approved in January 2010.

- **Equipment:** As each interview will be audio-recorded, a digital recorder with capacity to transfer data files to a computer will be used. A back-up recorder will also be taken to the site, along with batteries to ensure that approximately 12 hours of interviews can be safely recorded. A journal will be used to track the sequence of interviews and to record observations and notes that are pertinent to case development. A digital camera will also be used to record the site visit.

- **Contingency Planning:** should an interview participant be unavailable at the scheduled time, every effort to reschedule the interview during the site visit will be made. If this is not possible, arrangements to conduct the interview by telephone at a mutually convenient time will be made. This telephone conversation will be tape recorded and transcribed along with site interview recordings. Should I be unable to travel to a site or, for reasons of illness, be unable to complete the interview process, I will either reschedule the visit, or develop a strategy to complete recorded interviews by telephone.

- **Acknowledgements:** Each participant will receive a thank-you note acknowledging their contributions to the case study and the overall research project.

7.4 interview Protocols: As noted under Section 5.1: Construct Validity, the interviews are structured to gather data that is aligned with an explanatory thematic framework for learning transfer experiences. At the same time, it is important to recognize that this is an emergent research method that should respond to unanticipated lines of enquiry that are relevant to the questions. Accordingly prompts for the interview with CRM graduates and questions for the focused interviews with colleagues and supervisors serve as guidelines for interviews, but not rigid structures that limit further discussions.

Prompts for open-ended in-depth interviews with CRM Graduates
Involvement in and outcomes of the CRM Program • **Request description of the graduate's position and role(s) within the organization.** (Question 1) ☐ Time in position ☐ Affiliation with job, with organization, with profession ☐ Career progression ☐ Scope of influence ☐ Job and role identity ☐ Degree of self vs. other management and supervision ☐ Degree of personal initiative and level of comfort with these arrangements • **Explore her sense of affiliation to the museum profession, to her organization and her job.** (Questions 2, 3) ☐ Membership and involvement in external professional activities ☐ Awareness of external expectations for best practices ☐ Satisfaction derived from work ☐ Self-directed and autonomous approach to growth and career advancement ☐ Role of mentors

- **Enquire about her approaches to personal or work-based learning and performance planning** (Question 2,3)
  - ☐ How are organizational and personal learning and performance goals established?
  - ☐ What kinds of organizational policies, procedures and systems support performance and professional development planning?
  - ☐ Discuss the degree to which the learner considers herself **self-directed or other-directed** in setting learning and performance goals and autonomous in perusing and applying new knowledge.
  - ☐ How clearly does she ally herself with external professional communities and support groups, and have these been influential in setting learning goals?
  - ☐ Tensions with personal/museum goals?
- **Enquire about reasons why the learner participated in the CRM program in particular and what she gained as a result**. (Question 3)
  - ☐ What were her expectations of personal, professional and job performance benefits?
  - ☐ How aligned was the content with her job requirements?
  - ☐ Did she see the program as developmental or remedial?
  - ☐ What were the professional and personal benefits of the program?
  - ☐ What pleasures and frustrations did the learner encounter in the learning process?
  - ☐ Was any aspect transformational?
- **Discuss the learner's perspective on how her CRM participation was initiated, supported and perceived in the organizational context.** (Question 1,2)
  - ☐ Explore her perceptions of the level of awareness and the attitudes of supervisors and colleagues regarding her participation in the program.
  - ☐ Annual professional development budget? $$ allocation and time off
  - ☐ Did the learner focus on work-based issues in assignments or their thinking?
  - ☐ What expectations/goals did the workplace have for her involvement in the CRM program?
  - ☐ Were there any deliberate efforts to draw on her new knowledge and skills?
- **How did CRM delivery methods (on-campus, online) influence learning and transfer?** (Question 1)
  - ☐ Did the learner focus on work-based problems in discussions, assignments and reflection?
  - ☐ Did the longer time frame and/or the proximity to the workplace impact the transferability of DE course content?
  - ☐ Do course materials continue to serve as a resource for the learner? For colleagues?

Transferring Learning

- **Enquire about the evolution of the museum's position on socially engaged practice[40] and its ability to undertake such roles, along with other issues and pressures for change.** (Question 1)
  - ☐ How would the learner define socially engaged practice
  - ☐ What kinds of social engagement are typical in this museum

[40] While socially engaged practice was an initial interest, it quickly became evident that learners wanted to discuss much broader areas of practice so this protocol was revised to a more generalized focus after the first interviews.

- ☐ Check consistency with mission and strategic plan
- ☐ What are the other priorities that preoccupy the museum?
- ☐ What are key issues in the community? Does the museum deal with these?

- **Explore ways in which the learner responded to concepts that were discussed in coursework**. (Question 2)
  - ☐ Were these new concepts?
  - ☐ Were they transformational? In what way?
  - ☐ Were they aligned with the learner's values and interests?
  - ☐ How motivated was the learner to apply these in the workplace?
  - ☐ What challenges did such concepts present?
- **How relevant were concepts of various practices to the organization and the job?** (Question 2)
  - ☐ In what specific ways were they relevant to the organization?
  - ☐ Is this a significant change in the museum?
  - ☐ In what specific ways were they relevant within the learner's job?
  - ☐ What specific opportunities for transfer existed?
  - ☐ What kinds of knowledge transferred directly? Easily?
  - ☐ What needed to be adapted?
- **Enquire about specific instances in which learned knowledge and/or skills were successfully applied by the learner**. (Question 1)
  - ☐ Was this initiative to resolve a specific issue or problem?
  - ☐ What specific role did the learner play?
  - ☐ Who else was involved in the process?
  - ☐ Did a colleague or supervisor play a mentoring or partnership role?
  - ☐ How were external partners involved?
  - ☐ What initiatives/changes were implemented?
  - ☐ What tensions and obstacles had to be overcome?
  - ☐ Was further learning required to see it through?
  - ☐ How was success measured?
  - ☐ What personal and organizational impacts resulted?
  - ☐ Was this an unusual occurrence or was the learner successful in multiple transfer initiatives?
- **Enquire about the learner's perceptions of their personal ability to introduce new practices** (Question 1,3)
  - ☐ How confident did they feel about their knowledge and ability to introduce new practices?
  - ☐ Were they effectively positioned and sufficiently influential?
  - ☐ What did they see as their strengths in introducing new practices?
  - ☐ What did they feel were their primary challenges?
  - ☐ Do they perceive changes as they mature in the job?
- **Enquire about the degree to which learned knowledge and skills needed to be adapted to suit the values, processes and concerns of the workplace.** (Question 2)
  - ☐ How are theory/practice generally valued and approached within the museum?
- **Explore the learner's perceptions of both supports and constraints in their specific jobs and immediate work groups that influenced their efforts to transfer knowledge, skills and attitudes, particularly with reference to socially engaged practice.** (Question

2)
- ☐ goal setting and performance planning
- ☐ opportunity to apply learning
- ☐ fit with position requirements
- ☐ supervisory relations
- ☐ peer relations
- ☐ coaching and feedback
- ☐ resource availability, including time

- **Explore the learner's perceptions of both supports and constraints in the museum in general that influenced their efforts to transfer knowledge, skills and attitudes, particularly with reference to socially engaged practice**. (Question 2)
  - ☐ senior management supports
  - ☐ policies and procedures to support continuous learning and human resource development
  - ☐ fit of learning with organizational goals and priorities
  - ☐ pressures for change
  - ☐ reward systems
  - ☐ Are museum values associated with socially engaged practice influential in positive or negative ways?
  - ☐ If resistance was encountered, what shaped the opponent stakeholder values and positions?
  - ☐ Were there external pressures (community or society) that influenced transfer? (Question 3)
- **Explore perceptions of benefits and rewards that accrue from new learning and new practices.** (Question 1)
  - ☐ Improved job performance
  - ☐ Recognition, respect
  - ☐ Contribution to organizational goals
  - ☐ Improved personal/professional competency and confidence
  - ☐ Career advancement
- **Explore perceptions of detrimental effects of new practices.** (Question 1)
  - ☐ Threats to relationships, service delivery, personal credibility/reputation

Summary

- **Explore the learner's general positive and negative feelings and perceptions about their personal capacity to introduce new practices as a result of participation in CRM** (Question 3)
  - ☐ Impact of interview participation on self-awareness and self-direction
- **Discuss the learner's general feelings regarding workplace opportunities and constraints for transfer** (Question 2)
- **Other reflections, comments**

Questions for focused and structured interviews with colleagues and supervisors
To gain background information: • Please describe your position and responsibilities within the museum, along with your overall museum career. • How actively engaged are you and your colleagues in professional organizations and activities outside the museum? ☐ Regional museums associations ☐ Conferencing, writing, consulting, committee work
To explore Question 2: How do conditions in the workplace shape this process? • How consistently are job descriptions and performance expectations aligned with standardized professional functional and competency guidelines? ☐ Review organizational chart ☐ CMA Competency guidelines ☐ AAM institutional accreditation standards • How does the museum approach planning for short and long-term development and change? How does it anticipate the need for new knowledge and skills to support change? ☐ Strategic Plan ☐ Work plans • What do you see as the key changes that are impacting the ways in which work is designed and carried out in your museum? ☐ Technology ☐ Service ☐ Programs ☐ Resources • What kinds of policies, procedures and resources are in place to support individual and organizational learning activities? ☐ Work and/or performance plans ☐ Learning plan/fund ☐ Performance appraisals ☐ Informal systems ☐ Other? ☐ How extensively are these implemented and used? • What kinds of formal and informal expectations, incentives and rewards are in place to encourage the introduction of new practices? ☐ Pre-training ☐ Post training • What forms of continuing professional development are staff most commonly engaged in? ☐ In-house training ☐ External coursework ☐ Conferences ☐ Travel/study

☐ Job exchanges ☐ Independent reading/research ☐ Mentoring • Are there processes in the workplace that require or encourage staff to share and apply what they have learned through continuing professional education? ☐ Report back ☐ Debriefing ☐ Direct application to work • How do supervisors, colleagues, and work teams tend to support the introduction of new practices? • What do you see as particular strengths that support transfer in this workplace? • Particular weaknesses?
To explore Question 1: What are the experiences of museum professionals (particularly the CRM graduate) as they seek to apply the concepts, principles and skills relating to socially engaged practice that they have gained through continuing professional education? • Please describe your formal and collegial relationships with [the CRM Graduate; XX]. • To what degree were you aware of and/or involved in planning for and supporting XX's participation in the Cultural Resource Management Program? • How did XX approach the introduction of concepts and practices gained from her studies? • In what ways did her involvement in the CRM program benefit your workplace?
To explore Question 3: How does the CRM graduate's personal agency influence their capacity to put new knowledge to work? • Please comment on your perceptions of XX's strengths in introducing new practices.

Research Protocol Appendix 1

[Department of Curriculum and Instruction letterhead] ***Participant Consent Form***

Research Project: Putting museum studies to work: Knowledge transitions from continuing professional education to the museum workplace
Principal Investigator: Joy Davis, PhD Candidate

You are invited to participate in a study entitled "Putting learning to work: Knowledge transitions from continuing professional education to the museum workplace" that I am undertaking as part of the requirements for a PhD in Educational Studies in the Department of Curriculum and Instruction at the University of Victoria. This project is being conducted under the supervision of Professor Laurie Baxter. You may contact my supervisor at 250-721-7777 or by email at lbaxter@uvic.ca.

Purpose of this Research The purpose of this enquiry is to contribute to our understanding of how learning from continuing professional education tends to be applied in museum settings. It explores this topic by investigating, analyzing and comparing the experiences of CRM graduates as they return to their workplaces with newfound knowledge relating to socially engaged museum practices. In taking this approach, this study problematizes the general assumption that when professionals participate in continuing professional learning activities, the outcomes are consistently beneficial for both the learner and the workplace. A comparative case study methodology will be utilized to explore the following research questions:

What is the experience of museum professionals as they seek to apply the concepts, principles and skills relating to socially engaged practice that they have gained through continuing professional education? How does their personal agency influence their capacity to put new knowledge to work? How do conditions in the workplace shape this process?

Importance of this Research This enquiry is important since no prior research has been conducted on knowledge transfer in the museum sector. This research project makes a unique contribution by providing:

- insight on how professionals interact within museum settings to pursue continuing education and to apply resulting knowledge and skills. This study focuses on ways in which learning associated with socially engaged museum practices makes a transition from the classroom to the workplace.
- analysis of how factors relating to individual agency and workplace affordances facilitate or constrain the transfer of knowledge
- observations on ways in which the nature of the content and instructional delivery of continuing professional education impact the transferability of students' learning
- analysis of challenges that workers and museums face in creating and/or responding to conditions that facilitate transfer
- strategies to strengthen teaching for transfer in continuing professional education
- expansion of the workplace learning discourse to include the experience of museum workers and systems

Participant Selection *For version provided to CRM graduates:* You are being asked to participate in this study because you have completed the Cultural Resource Management Program while professionally employed in the museum sector and have experience in relating

the knowledge you have gained to needs in your workplace.

For version provided to colleagues/supervisors: Your colleague, XXX, has completed the Cultural Resource Management Program and has sought to apply new concepts in the workplace. Your perspectives on this experience are valued as they provide insight to the conditions offered by your workplace for the introduction of new knowledge and practices.

What is Involved? If you agree to voluntarily participate in this research, your participation will include:

For version provided to CRM graduates: …an open-ended interview that may be up to six hours in length, conducted at your workplace or at a location of your choice, to explore your experiences in applying the knowledge associated with socially engaged practice that you have gained through the Cultural Resource Management Program. Through this interview, I would like to develop insight on the factors that motivate both your participation in the CRM program and your efforts to apply your learning. As well, I would like to explore your experience and perspectives on the workplace conditions that encourage or constrain the application of new knowledge associated with socially engaged practice. This interview will be audio-recorded, and transcriptions will be used in the preparation of a case study.

In preparation for your participation in this case study, I request that you advise me of any further permissions needed to undertake a case study in your organizational context, and that you recommend and provide me with names and contact information for up to five colleagues and supervisor(s) who I can speak with regarding workplace policies, programs and conditions that are in place to support continuing professional education and the transfer of knowledge and skills that you have gained from the Cultural Resource Management Program. I will contact them directly to invite their participation in this study, to advise them of conditions and expectations, and to request their informed consent to participate.

I also request that you provide me with documentation that describes your museum's mission, organizational structure, strategic plan, and professional development policy along with your position description and current performance plan, since these provide background information that enhances my understanding of your organizational context. Once a draft of the case study is developed, I will send you a copy along with an online survey that provides you with an opportunity to indicate errors or omissions in the case, or to offer additional perspectives. Please be advised that information about you that is gathered for this online survey, including information that can be directly attributed to you as a study informant, is collected and stored by an online program located in the U.S. As such, there is a possibility that information about you may be accessed without your knowledge or consent by the U.S. government in compliance with the U.S. Patriot Act.

For version provided to colleagues/supervisor(s): …a focussed interview that may be up to 1.5 hours in length, conducted at your workplace, to explore your perspectives on conditions for the introduction of new knowledge and practices in your workplace, and the experience of your colleague in applying concepts gained through participation in the Cultural Resource Management Program. Through this interview I would like to develop insight on factors that, in your opinion, encourage or constrain the application of new knowledge associated with socially engaged practice. This interview will be audio-recorded and transcriptions will be used in the preparation of a case study. Once a draft of the case study is developed, I will send you a copy along with an online survey that provides you with an opportunity to indicate errors or omissions in the case, or to offer additional perspectives. Please be advised that information

about you that is gathered for this online survey, including information that can be directly attributed to you as a study informant, is collected and stored by an online program located in the U.S. As such, there is a possibility that information about you may be accessed without your knowledge or consent by the U.S. government in compliance with the U.S. Patriot Act.

Inconvenience Participation in this study may cause some inconvenience to you, particularly in terms of the time required to participate in the interviews.

Risks There are some potential risks to you by participating in this research. These may include a level of discomfort, frustration or embarrassment in discussing negative aspects of the knowledge transfer process. To prevent or to deal with these risks I will ask you to refrain from making any comments about colleagues or circumstances that may be considered libellous, I will strive to conduct the interview in a positive and constructive manner, and I will protect the confidential nature of your comments in subsequent case development.

Benefits The potential benefits of your participation in this research include the opportunity to reflect on the ways in which you and your colleagues approach continuing professional education along with the ways in which your workplace provides the conditions necessary for effective knowledge transfer. Other potential benefits of the research project include a heightened awareness in the museum sector of educational and workplace strategies to improve returns on investments made in learning for professional practice, and better integration of the literatures of workplace learning and museum continuing professional education.

Voluntary Participation Your participation in this research must be completely voluntary. If you do decide to participate, you may withdraw at any time without any consequences or any explanation. If you do withdraw from the study prior to the finalization of the case study, your data will not be integrated within the case study and transcripts of this data will be destroyed.

Anonymity Given the benefits of developing an authentic case along with the challenges of ensuring anonymity across your working group and within the small museum professional community, case studies in this dissertation will describe your museum and your experience in an open and undisguised manner. However, your position title or a pseudonym rather than your name will be used in the case descriptions included in the dissertation to depersonalize the account. Not only does this provide you with a limited level of anonymity, it also encourages the reader to consider transfer dynamics as a series of social interactions among a group of professionals in the museum context. Should pseudonyms be used, this will be noted in the case introduction. Subsequent journal articles and conference presentations will focus on research findings as they relate to the guiding theoretical framework of knowledge transfer factors and will not feature individual cases or make direct reference to the individuals involved.

Confidentiality The case study will provide an integrated description of the perspectives provided by you and your colleagues, based on transcripts from recorded interviews and information obtained from documents provided as background context. These recordings, transcripts, documents and any personal information that you provide will be treated as private and confidential, will be stored in secure filing cabinets or password protected electronic files. Passwords and data coding keys will be stored separately. As principal investigator, I will be the primary person working with the data, although there is a possibility that a research assistant

will be involved in transcription. Interview transcripts and documentation may be examined by members of my supervisory committee, and can also be shared exclusively with the subject of the interview, by request.

In conducting the interviews, I will request that you not make observations regarding colleagues who are not directly involved in the knowledge transfer processes under discussion, and that you avoid comments that can in any way be construed as libellous. In preparing the case study I will strive to avoid presenting the actions of your colleagues in a negative light, and to protect any information that is explicitly shared with me in confidence. In some instances, direct quotes will be integrated in the case description and attributed to the source, using position titles or pseudonyms as appropriate.

Dissemination of Results It is anticipated that the results of this study will be shared with others in the following ways:

- The dissertation for my PhD will include chapters devoted to the individual case studies along with a chapter that compares conditions for knowledge transfer. This document is printed for limited circulation in the University and is available online through the University of Victoria Libraries.
- I will prepare conference presentations and journal articles that explore aspects of the findings of this study, subject to acceptance by the presenting agency. Such presentations may identify case study locations, but will not identify individual respondents by name.

Disposal of Data Once the final draft of the dissertation is approved, original interview recordings and transcripts will be disposed of by erasing electronic data and shredding paper transcripts and associated notes.

Contacts Individuals that may be contacted regarding this study include

Joy Davis, PhD Candidate
University of Victoria
2927 Seaview Road
Victoria, BC V8N 1L2
250-477-0072; joydavis@uvic.ca

Laurie Baxter, PhD, Professor
Department of Curriculum & Instruction
Faculty of Education
University of Victoria
PO Box 1700, Victoria, BC V8W 2Y2
250-721-7777; lbaxter@uvic.ca

In addition, you may verify the ethical approval of this study, or raise any concerns you might have, by contacting the Human Research Ethics Office at the University of Victoria (250-472-4545 or ethics@uvic.ca).

Informed Consent

Your signature below indicates that you understand the above conditions of participation in this study and that you have had the opportunity to have your questions answered by the researchers.

Name	**Signature**	**Date**

Please keep one copy of this Participant Consent form,
and send a copy to Joy Davis at your earliest convenience.

REFERENCES for RESEARCH PROTOCOL

Anfara, V. A., & Mertz, N. T. (Eds.). (2006). *Theoretical frameworks in qualitative research*: SAGE.

Bandura, A. (2001). Social cognitive theory: An agentic perspective. *Annual Review of Psychology, 52*, 1-26.

Beach, K. (1999). Consequential transitions: A sociocultural expedition beyond transfer in education. *Review of Research In Education, 24*(1), 101-139.

Billett, S. (1996). Situated learning: Bridging sociocultural and cognitive theorising. *Learning and Instruction, 6*(3), 263-280.

Billett, S. (1998). Transfer and social practice. *Australian and New Zealand Journal of Vocational Education Research, 6*(1), 1-26.

Billett, S. (2001). Learning through work: Workplace affordances and individual engagement. *Workplace Learning, 13*(5), 209-214.

Billett, S. (2002). Toward a workplace pedagogy: Guidance, participation, and engagement. *Adult Education Quarterly, 53*(1), 27-43.

Blackbourn, C., Molnar, W., Herrick, C., Fiori, P., & Matthew, M. (2004). *Improving performance through evaluation: A resource guide for museum training providers and managers*: The Learning Coalition.

Blackler, F. (1995). Knowledge, knowledge work and organizations: An overview and interpretation. *Organization Studies, 16*(6), 1020-1047.

Bransford, J. D., & Schwartz, D. L. (1999). Rethinking transfer: A simple proposal with multiple implications. *Review of Research In Education, 24*(1), 61-100.

Broad, M. L. (Ed.). (2005). *Beyond transfer of training: Engaging systems to improve performance*: John Wiley and Sons.

Broad, M. L., & Phillips, J. J. (Eds.). (1997). *Transferring learning to the workplace*. Alexandria: American Society for Training and Development.

Burke, L. A., & Hutchins, H. M. (2007). Training transfer: An integrative literature review. *Human Resource Development Review, 6*(3), 263-296.

Carraher, D. W., & Schliemann, A. D. (2002). The transfer dilemma. *The Journal of the Learning Sciences, 11*(1), 1-24.

Chiaburu, D. S., & Marinova, S. V. (2005). What predicts skill transfer? An exploratory study of goal orientation, training self-efficacy and organizational supports. *International Journal of Training & Development, 9*(2), 110-123.

CMA. (1999). Ethics guidelines. Retrieved July 21, 2009

Daley, B. (2001). Learning and professional practice: A study of four professions. *Adult Education Quarterly, 52*(1), 29-54.

Daley, B. (2000). Learning in professional practice. *New Directions for Adult & Continuing Education, 2000*(86), 33-42.

Davis, J. (2001). *Good intentions/complex realities: Perspectives on continuing professional education in Canada's museum sector*. Victoria: University of Victoria.

Davis, J. (2009). *Survey of CRM graduates' experience in knowledge transfer (in preparation)*.Unpublished manuscript.

De Corte, E. (1999). On the road to transfer: An introduction. *International Journal of Educational Research, 31*(7), 555-559.

Edwards, A. (2010). *Being an expert professional practitioner: The relational turn in expertise*: Springer.

Engeström, Y. (1989). Learning by expanding: An activity-theoretical approach to developmental research. From http://lchc.ucsd.edu/MCA/Paper/Engestrom/expanding/toc.htm

Engeström, Y., & Kerosuo, H. (2006). From workplace learning to inter-organizational learning and back: The contribution of activity theory. *Workplace Learning, 19*(6), 336-342.

Eraut, M. (2004). Transfer of knowledge between education and workplace settings. In H. Rainbird, A. Fuller & A. Munro (Eds.), *Workplace learning in context* (pp. 201-221). London: Routledge.

Evans, K. (2009). *Seven principles for putting knowledge to work: Exploring their potential for the 'sandwich placement model' of work integrated learning.* Paper presented at the Learning to be professional through a life-wide curriculum, University of Surrey.

Fuller, A., & Unwin, L. (2004). Expansive learning environments: Integrating organizational and personal development. In H. Rainbird, A. Fuller & A. Munro (Eds.), *Workplace learning in context* (pp. 126-144). London: Routledge.

Gibson, J. J. (1986). *The ecological approach to visual perception*. Hillsdale, NJ: Lawrence Erlbaum.

Gilley, J. W., & Hoekstra, E. (2003). Creating a climate for learning transfer. In E. F. Holton & T. T. Baldwin (Eds.), *Improving learning transfer in organizations* (pp. 271-303). San Francisco: Jossey-Bass.

Greeno, J. G., Smith, D. R., & Moore, J. L. (1996). Transfer of situated learning. In D. K. Detterman & R. J. Sternberg (Eds.), *Transfer on trial: Intelligence, cognition, and instruction* (pp. 99-167). Norwood, NJ: Ablex Publishing Corporation.

Haskell, R. E. (2001). *Transfer of learning: Cognition, instruction, and reasoning*. Biddeford, Maine: Academic Press.

Hatano, G., & Greeno, J. G. (1999). Commentary: Alternative perspectives on transfer and transfer studies. *International Journal of Educational Research, 31*(7), 645-654.

Holton, E. F. (2002). Theoretical assumptions underlying the performance paradigm of human resource development. *Human Resource Development International, 5*(2), 199-215.

Holton, E. F. (2005). Holton's evaluation model: New evidence and construct elaborations. *Advances in Developing Human Resources, 7*(1), 37-54.

Holton, E. F., & Baldwin, T. (2003). Making transfer happen: An action perspective on learning transfer systems. In E. F. Holton & T. T. Baldwin (Eds.), *Improving learning transfer in organizations* (pp. 3-15). San Francisco: Jossey-Bass.

Illeris, K. (2004). A model for learning in working life. *Journal of Workplace Learning, 16*(8), 431-441.

Jacobs, R. L., & Park, Y. (2009). A proposed conceptual framework of workplace learning: Implications for theory development and research in human resource. *Human Resource Development Review, 8*(2), 133-150.

Leberman, S., McDonald, L., & Doyle, S. (2006). *The transfer of learning: Participants' perspectives of adult education and training*: Gower Publishing, Ltd.

Lobato, J. (2006). Alternative perspectives on the transfer of learning: History, issues, and challenges for future research. *Journal of the Learning Sciences, 15*(4), 431-449.

Macleod, S. (2001). Making museum studies: Training, education, research and practice. *Museum Management and Curatorship, 19*(1), 51 - 61.

McCarthy, C., & Cobley, J. (2009). Museums and museum studies in New Zealand: A survey of historical developments. *History Compass, 7*(2), 395-413.

Merriam, S. B., & Leahy, B. (2005). Learning transfer: A review of the research in adult education and training. *PAACE Journal of Lifelong Learning, 14*.

Ottoson, J. M. (1997). After the applause: Exploring multiple influences on application following an adult education program. *Adult Education Quarterly, 47*(2), 92-107.

Parent, R., Roy, M., & St-Jacques, D. (2007). A systems-based dynamic knowledge transfer capacity model. *Journal of Knowledge Management, 11*(6), 81-93.

Pea, R. D. (1987). Socializing the knowledge transfer process. *International Journal of Educational Research, 11*(6), 639-663.

Raelin, J. A. (2008). *Work-based learning*. San Francisco: Jossey-Bass.

Rouiller, J. Z., & Goldstein, I. L. (1993). The relationship between organizational transfer climate and positive transfer of learning. *Human Resource Development Quarterly, 4*(4), 377-390.

Sadler-Smith, E. (2006). *Learning and development for managers: Perspectives from research and practice*. New York: Wiley-Blackwell.

Sessa, V. I., & London, M. (2006). *Continuous learning in organizations: Individual, group and organizational perspectives*. Mahwah, NJ: Lawrence Erlbaum Associates, Publishers.

Sfard, A. (1998). On two metaphors for learning and the dangers of choosing just one. *Educational Researcher, 27*(2), 4-13.

Stevenson, J. (2002). Concepts of workplace knowledge. *International Journal of Educational Research, 37*(1), 1-15.

Szulanski, G. (1996). Exploring internal stickiness: Impediments to the transfer of best practice within the firm. *Strategic Management Journal, 17*, 27-43.

Szulanski, G. (1999). The process of knowledge transfer: A diachronic analysis of stickiness. *Organizational behavior and human decision processes, 82*(1), 9-27.

Tasse, A., & Hrimech, M. (2003). *Increasing learning transfer amongst newly trained employees: The role of the supervisor.* Paper presented at the The Changing Face of Work and Learning, Edmonton, AB.

Tuomi-Grohn, T., & Engeström, Y. (Eds.). (2003). *Between school and work: New perspectives on transfer and boundary-crossing*. Amsterdam: Pergamon.

Weil, S. (1988). The ongoing pursuit of professional status. *Museum News, 67*(2), 30-34.

Yelon, S. L., & Ford, J. K. (1999). Pursuing a multidimensional view of transfer. *Performance Improvement Quarterly, 12*(3), 58-78.

Yin, R. K. (2009). *Case study research: Design and methods* (4th ed.). Thousand Oaks, CA: SAGE Inc.

Degree of Autonomy in Approaches to Work, Learning and Transfer

Autonomous workers are not normally required to follow set procedures; are not closely supervised in their performance; decide for themselves how to operate for some or all tasks; and decide whether and when to apply new knowledge to their performance. (Broad, 2005)

	No autonomy: All decisions about my performance are made for me by supervisor(s)	**Low:** I play a minor role in decisions in this area	**Moderate:** I make some decisions in this area, but many are made for me	**Considerable:** I frequently make decisions in this area	**Total autonomy:** I am the sole decision-maker in this area
How much autonomy do you have in defining the ways you approach your day-to-day work?					
...in identifying emergent knowledge and skills associated with your specific job?					
...in identifying emergent knowledge and skills that will enhance the museum's programs and services?					
...in participating in professional development?					
...in introducing new practices that impact my own approaches to my work?					
...in introducing new practices that impact the work of others?					
...in introducing new knowledge and practices that impact organizational services and goals?					
...in monitoring and evaluating the successful implementation of new knowledge and practices?					

Degree of Personal Initiative in Approaches to Work, Learning and Transfer

Personal Initiative involves "...a self-starting, active and persistent approach to work. Additional aspects of the concept are that this behavior is consistent with the organization's mission, goal-directed, and action-directed..." Frese (2001, p. 100)

	Never	Rarely	Occasionally	Frequently	Sole Initiator
How often do you exercise initiative in defining the ways in which you approach your day-to-day work?					
...in identifying emergent knowledge and skills associated with your specific job?					
...in identifying emergent knowledge and skills that will enhance the museum's programs and services?					
...in participating in professional development?					
...in introducing new practices that impact my own approaches to my work?					
...in introducing new practices that impact the work of others?					
...in introducing new knowledge and practices that impact organizational services, priorities and goals?					
...in monitoring and evaluating the successful implementation of new knowledge and practices?					

Comments on the role of autonomy and initiative in your work:

Appendix D: Coding Protocol

Coding: As the empirical work of this study is based in thematic analysis (Braun and Clarke 2006), interview transcripts were systematically coded in *NVivo,* using themed codes initially derived from the guiding framework of transfer factors. In addition to themes associated with predicted and emergent agency and workplace affordance conditions and factors, coding also reflected themes linked with the nature of knowledge, engagement in learning experiences, and work experiences more generally to capture the background and context of transfer experiences. Additional themes were added during the coding process as topics that were salient to an overall understanding of respondents' experiences were identified. In many cases, data sets were coded in multiple categories given their relevance to multiple themes. Categories of coding included:

CODING FOR CASE ANALYSIS

WORKPLACE CLIMATE

Workplace Affordances

- Opportunities for transfer
- Readiness for new practices
- Resources
- Relevance to practice
- Adaptation
- Pre-training strategies
- Post-training strategies
- Supervisory supports
- Collegial Supports - Teamwork
- Organizational Culture
- Obstacles
- Positional autonomy
- Timing
- Rewards
- Examples
- Job Design
- Goals
- Team Approaches
- Perceptions of Competence

Museum Management

- Forces of change
- Governance
- Human resource mgt
- Management
- Mission, mandate, purpose
- Planning - general
- Planning - professional development
- Policies, procedures - general

- Policies, procedures - professional development

Collegial Relationships
- New practices
- Teamwork

External Pressures

Supervisory Relations
- Working Relationships
- Feedback
- Performance planning
- Planning for professional development
- Coaching, mentoring

Nature of Community
- Characteristics
- Expectations
- Issues
- Relationship with Museum

PERSONAL AGENCY
- Autonomy, Locus of Control
- Confidence
- Developmental Stage
- Disposition
- Goals
- Initiative
- Job Affiliation
- Mastery
- Motivation
- Obstacles
- Perceptions of opportunity for transfer
- Rewards or Benefits
- Strengths
- Transfer Strategies
- Values conflict
- Weaknesses

Position
- Job Design
- Evolution of job
- Scope
- Skill requirements
- Job satisfaction
- Job frustrations

- Goals
- Roles and Responsibilities
- Autonomy in Practice
- Evaluation of Performance

Professional Involvement
- Preparatory Education
- Memberships
- Involvement
- Influences
- Conflicts, tensions
- External collegial relations

Learning for Professional Practice
- Benefits
- Challenges, Obstacles
- Deterrents
- Goals
- Instructional Design
- Learning Initiation Process
- Lifelong learning
- Motivations
- Organizational supports
- Performance expectations
- Relevance
- Sources of Learning
- Transformational experiences
- Workplace attitudes

Learning Transfer
- Applications to work
- Examples
- Overall comments
- Perceptions of Importance

Content
- Best practices
- emergent practice
- Resource Materials
- Similarity
- Theory to practice

Appendix E: Sample Thick Description – Fortress of Louisbourg

FORTRESS OF LOUISBOURG NATIONAL HISTORIC SITE OF CANADA

Description of interviews conducted in January 2010

by Joy Davis, University of Victoria

PARTICIPANT SELECTION

The Fortress of Louisbourg National Historic Site on the Atlantic coast of Cape Breton in Nova Scotia was selected for this case study since Ruby Fougère, a long-time employee, is a recent graduate of the Cultural Resource Management Program (2009). The Fortress provides an interesting context for a study of learning transfer because it is a large cultural heritage site that operates within the complex Parks Canada system. As Fougère has completed all her coursework in a distance education format, her experience also contributes in interesting ways to this study.

Fougère has worked as Curatorial Collections Assistant in the Cultural Resource Management (CRM) Section of the site for over twenty years, and in that time she has developed specialized skills in the management, care and handling of artefacts that furnish the reconstructed 18C buildings on the site. At the time of case development she was working on special assignment as Project Coordinator for Culinary, reporting to the Superintendent. In this six-month special assignment she was developing strategies and resources to support the presentation, product development, sales and interpretation of foods that would have been utilized on site in the early 18th Century.

Fougère began the Cultural Resource Management Program in 2002, and has taken the following courses to complete her Diploma:

- **Museum Principles and Practices, Parts 1 and 2 (2002/03)**
- **Principles and Practices in Heritage Conservation, Parts 1 and 2 (2003/04)**
- **Collections Management (2002)**
- **Public Programming (2003)**
- **Conserving Historic Structures (2004)**

- **Building Community Relationships (2005)**
- **Caring for Museum Collections (2007)**
- **Managing Cultural Organizations (2007)**
- **Directed Study: Conservation Issues of Fortress of Louisbourg Building and Collections (2008)**

My conversations with Fougère took place over two days, on January 13 and 14, 2010, totalling 3 hours and 13 minutes of recorded interviews. In this time, she shared her thoughts on her roles and the ways in which she has developed and applied her expertise in collections management and more recently in community engagement and aspects of visitor experience. As well, I toured the Site with Fougère, along with the town of Louisbourg, the adjacent lighthouse which sits on the site of the oldest lighthouse in North America, and the City of Sydney.

Based on a review of the organizational chart, and in consultation with Fougère, the following colleagues[41] from the CRM Section were invited to participate in interviews regarding the ways in which this workplace supports continuing professional education and learning transfer:

- **Brian Harpell, Curator/Collections Specialist. Harpell began work at Fortress of Louisbourg in 1973 as a labourer, and over the next decade moved into interpretation and then collections work. He oversees the care of the historical collections of the Fortress, including 4500 original 18C artefacts, and another 13,500 reproductions used in the interpretive programs, costume animations and furnishings (Curator, p. 1). He has been in his current position for over twenty years and has been Fougère's supervisor throughout her time at the Fortress. My interview with the Curator was 1 hour and 19 minutes in length.**
- **Willis Stevens, Cultural Resource Manager. Stevens began his work with Fortress of Louisbourg in the late '60s as an archaeological assistant. This work experience attracted him to the profession and he completed a degree in archaeology at Memorial University and worked in underwater archaeology for Parks Canada throughout most of his career,**

[41] I have the permission of all involved to feature their names and all have read and endorsed this thick description. In the dissertation however, their position titles rather than their names are used to depersonalize the case descriptions and analyses.

returning to Fortress of Louisbourg in 2007 to assume the role as Cultural Resource Manager. In this capacity he oversees all aspects of the care of the buildings and collections. He reports to the Unit Superintendent for Cape Breton, and supervises the other staff that I interviewed. My interview with Stevens was 55 minutes in length.

- Maura McKeough, Conservator. McKeough completed a Master of Museum Studies at the University of Leicester along with coursework at Algonquin College and an apprenticeship in wood conservation in England. She began working at Fortress of Louisbourg in 1990, further developing her expertise in the conservation of artefacts through in-house training. She has worked closely with Fougère on the care of collections over the years. My interview with McKeough was 57 minute in length.
- Anne Marie Jonah, Historian. Jonah completed a degree in history and after working as a language evaluator and teacher with the Public Service Commission for a number of years returned to Carleton University to complete a Masters degree in history focussing on society and economy of a fisheries community in 18C Nova Scotia. She was hired as Historian at Fortress of Louisbourg in 2003, and has worked with Fougère on a number of research projects including the current development of culinary information and products. My interview with Jonah was 1 hour and 16 minutes in length.

A total of 7 hours and 59 minutes of interview data were recorded for this case study. Transcriptions of these interviews totalled 104 pages. Since more than 60 employees work on site year round in such diverse areas as administration, Site management, and visitor experience, my conversations with participants employed in the Cultural Resource Management Section captured only one aspect of the organizational dynamics at the Fortress of Louisbourg.

As well, I spoke with staff of the Leadership and Learning Secretariat of Parks Canada who works from the Site as a resident of Cape Breton. While I did not interview them formally, my conversation with them provided an opportunity to develop my understanding of Parks Canada' current learning strategy.

FIRST IMPRESSIONS

The Fortress of Louisbourg sits on a cold and windswept point, with the Atlantic at its back, overlooking a calm inlet at its front gate and the modern town of Louisbourg across the

bay. An imposing fortification provides a backdrop for the collection of 18th Century buildings that cluster along the waterfront. There is a strong sense of history in this isolated site, despite the absence of visitors on my January visit. A few cars are tucked behind buildings, suggesting that staff are at work inside, but I know that most are busy in the complex of administration buildings hidden in the forest outside the Fortress compound. The interpreters acting as soldiers and townspeople who animate the Site and the crowds of visitors will not return until late spring.

The Parks Canada website describes Fortress of Louisbourg as "a series of experiences that set a mood" (Parks Canada, 2009b). This careful language effectively captures both the essence and the management dilemma of Canada's largest and arguably its best known heritage site presentation. The essence of Louisbourg is conveyed through the faithfully reconstructed complex of military fortifications, warehouses, barracks, and associated buildings that create a "critical set piece" to transport the visitor to the early 18th Century and provide "a wonderful backdrop or context" (Parks Canada, 2001: 35) for living history presentations of the tensions, ambitions and lifestyles of the people who built and defended this "cosmopolitan and relatively sophisticated" French fortification and seaport (Parks Canada, 2010, p. 11). These structures, which are currently the "dominant feature and focus of activities on the Site" (Parks Canada, 2010, p. 38) as well as archaeological evidence of more extensive settlement, attract tens of thousands of visitors annually to visit what one promotional piece refers to as 'the jewel in Parks Canada's crown.' This 6,000 hectare National Historic Site commemorates the brief but significant period in which the French and British battled for hegemony on the east coast of North America. In addition to witnessing two harrowing battles that ultimately resulted in British dominance, Louisbourg's strategic location and its safe harbour made it an early centre for trade and for the important North Atlantic fishery (McLean, 1995). As MacLean notes, "Unlike all other substantial and significant colonial sites, Louisbourg has no major continuum into the nineteenth and twentieth centuries, no city built over it. The consequence in historical, archaeological and museological terms has been a unique and extraordinary opportunity to preserve, study and describe the material culture and life of an important eighteenth century community" (pp. 13-14).

While the essence of Fortress of Louisbourg is conveyed through this complex of reconstructed buildings that so effectively frame the visitor experience, these buildings also

create dilemmas for Site management. They have been modeled on approximately one quarter of the building stock that was erected for the Fortress from the 1720s to the 1750s and, as reconstructions, they are fraught with philosophical and practical problems. On a practical level, they are aging, and as several staff point out, they are now older than any of the original structures ever became because the British reduced the Fortress to rubble in 1760. As these reconstructions have been meticulously designed and built according to 18th Century standards, they are subject to water and mould damage and to materials degradation in the face of sun, wind, rain, salt and freeze-thaw cycles in their exposed maritime site. The 2010 Management Plan (Draft) notes that only 33% of the Site's assets are in good condition (p. 21). The cost of the specialized care required to sustain these aging buildings is daunting and contemporary recapitalization to maintain the buildings is integrating modern interventions to meet codes and standards and to "ensure the longevity" of the buildings (Parks Canada, 2001, p. 35). At the same time, the geological subsidence of Cape Breton combined with rising ocean levels, particularly in storm periods, threatens the low-lying town site and adjacent archaeological resources. Just prior to my visit, storms washed away banks along nearby beaches, revealing human remains, thought to be soldiers who died in battles in the 18th Century. Coastal erosion is seen as a serious threat to the Site (Parks Canada, 2010).

Fortress of Louisbourg also raises debates on a philosophical level, as reconstructed buildings are not generally respected as significant historic resources since they lack authenticity. This Site was constructed over a period of two decades starting in 1961, both to memorialize the nationally significant story of the Fortress, and as an ambitious strategy for regional economic and workforce development with the decline of the coal and steel industries on Cape Breton. Extensive historical and archaeological research was conducted, meticulous blueprints were prepared, and many local people developed specialized skills as trades people, carpenters, masons, curators, and interpreters in this twenty-year building project. The project was challenging, in part because it was directed across multiple jurisdictions and from Ottawa, and in part because expertise in a heritage project of this scale, time period and complexity was scarce (Fry, 2004).

Despite the interpretive value of the results, the reconstructed buildings are regarded as Level 2 Cultural Resources according to Parks Canada's Cultural Resources Management Policy, and are therefore less worthy of support than the myriad authentic Level 1 resources found throughout Parks Canada's Historic Sites System. "Reconstructions and reproductions

of past forms should not be confused with what is genuinely the work of the past. Reproductions and reconstructions will be suitably marked so as to distinguish them from the original and, in the case of national historic sites, will not be used when they impair the commemorative integrity of those sites" (Parks Canada, 2009c). Indeed, if the reconstruction of buildings atop authentic archaeological remains at Louisbourg was proposed today, it seems unlikely that such an initiative would receive support, regardless of the significance of the Site and its story. Ironically, as Louisbourg buildings approach the fifty year mark, they are being evaluated for inclusion on the Federal Heritage Building Review Office (FHBRO) register of federally-owned heritage buildings, not for their historic authenticity but for their relatively brief existence and their interpretive significance in telling the story of the Fortress of Louisbourg.

Fry (2004) assesses the dilemma of Louisbourg by observing that despite concerns about the historic integrity of the Site, "the place succeeds...on a number of levels. It is undeniably a tourist magnet, altering summer visitation patterns to the Maritimes and transforming the appearance and economy of the modern town of Louisbourg nearby. But it is more. It serves as a vast educational tool, evoking some sense of eighteenth-century colonial French lifestyles and familiarizing visitors with the structures and artifacts of another era. Although purist elements of the heritage community may frown upon reconstructions as a means of preserving the past, the capacity to reach out to a wide public and to depict the past in ways that are both understandable and enjoyable is a powerful force in today's society...Governments have lavished far greater amounts on programs with far less immediate or long-term benefit economically or culturally" (pp. 212-213). This reflection captures yet another dilemma. Site interpretation, while carefully researched, always contains "a measure of conjecture and creation" (MacLean, 1995. p. 127), based on what inevitably must be a partial and selective account of its history.

As one staff member notes, Louisbourg has been a "grand experiment" (Curator, p. 7). As such, it has additional museological and heritage value since its research and interpretive activities and its collections development efforts have pioneered the creation of a visitor experience largely grounded in the notion of living history. This complex and demanding approach to presenting a site and its stories is "the only mode of historical interpretation, research, and celebration that involves all the senses" (MacLean, 1995, citing Anderson 1984). The process of developing the stories, characters, costumes, settings, experiences, collections

and interpretive objects used to animate the Site, is seen by some as Louisbourg's greatest legacy since these systems have become standard practice among selected Parks Canada sites, and in historic restorations around the world (MacLean, 1995). As the 2010 Management Plan draft notes "the Fortress of Louisbourg is a living laboratory...[with a] longstanding tradition of quality and innovation in archaeological, historical, curatorial and material culture research..." (p. 25). There is a depth of site-specific knowledge and experience at the Site that guides specialized and innovative cultural heritage practice.

COMMUNITY CONTEXTS AND ROLES

The Local Community: The Fortress of Louisbourg is integrally linked to the town of Louisbourg which sits across the bay, approximately 2 km from the Park Entrance. The settlement at Louisbourg predates the Fortress since the settlement was an outpost serving fisheries and trade into the new continent. The earliest recorded European visit to the harbour was in 1597 (Louisbourg, nd). The oldest lighthouse in North America was located across from the Fortress at the mouth of the bay, another testament to the long history of European activity this area. Contemporary Louisbourg is a quiet town of 1265 residents (Louisbourg, nd), many of whom are engaged with the seasonal tourism industry, the local fish processing plant, or who work at the Fortress in either full-time or seasonal positions. The town of Louisbourg is managed as part of the Cape Breton Regional Municipality that provides administrative services to 105 communities on the Island, ranging from villages with only a dozen residents, to the City of Sydney with over 24,000.

The reconstruction of the Fortress of Louisbourg was initiated in the early 1960s to, among other things, provide economic stimulus to an area hard hit by the decline in coal mining. The current relationship between the town and the Site continues to be shaped in both positive and negative ways by the reconstruction if the Fortress and its ongoing management. On one hand the twenty-year process of rebuilding one-quarter of the original structures was successful in creating employment for many residents, and in developing a range of skills that bridged unemployed miners into new occupations. As well, it initiated careers in park interpretation and management that continue today. The Site attracts thousands of visitors to the area, thereby stimulating tourism throughout Cape Breton and

creating seasonal business opportunities. As well, it offers amenities such as walking and skiing trails and cultural events that contribute to the quality of life on Cape Breton.

On the other hand, several staff note lingering issues associated with power relations that impact the current relationship between the town and the Site. Parks Canada, with its extensive resources, national corporate view, and links with the federal government has long been perceived as a dominant force. For example, expropriation of properties to consolidate the Site grounds caused bad feeling that spans forty years (Fougère, p. 7). The importation of expertise for both Park reconstruction and management also results in disconnect. As one participant notes, "even to this day, there are places in Louisbourg where 'those' people that come from away lived 'on the hill.' It's a silly thing, but it's a small community and you have to be quite cautious about that...I think we have to tread carefully. You just can't sort of go barrelling in with the maple leaf or the beaver on your back and say "we're it, kids" because we're not. We've got a lot to learn ourselves and there needs to be more give and take" (Conservator, p. 10).

Finding ways to strengthen relationships with both Louisbourg and Cape Breton more generally is a priority for the Fortress of Louisbourg. The 2001 Site Management Plan clearly recognizes the role of the Fortress in the local and regional economy through expenditures, employment, and its role in attracting visitors to the region (2001, p. viii) and contributing to "sustainable tourism-related enterprises" (p. 15). This management plan also notes the importance of "progressive working relationships with local communities, agencies, interest groups and the private sector that help lead to positive benefits based on commemorative integrity, environmental stewardship, and sustainable tourism" (p. 17). This is accomplished through a shift endorsed by Parks Canada throughout its system from "a tradition of ownership to one based on leadership, facilitation and stewardship, essentially a sharing of responsibility with others in decision-making and program delivery" (p. 18). One of the partnerships that facilitates the delivery of services for the Sites is with the locally-run Fortress of Louisbourg Volunteers, a registered non-profit society that provides interpretive, retail, food and event services thereby relieving the Park of these roles. This Foundation has greater flexibility than the Site to offer such services since it operates independently of the collective agreements and rules and regulations that impact Federal employees. It employs 90 people and contributes thousands of hours of volunteer time to the Site (Parks Canada, 2001, p. 47). Other collaborative partnerships include the Unama'ki Committee that provides a

means of ensuring that Aboriginal peoples are represented in decision-making, and the Louisbourg Institute that focuses on scholarly initiatives and student internships in collaboration with Cape Breton University.

The 2010 Management Plan (Draft) follows Parks Canada's general commitment to co-management strategies in stating that "By collaborating with local and cultural communities, industries and others we can achieve our common goals of protecting, managing and experiencing the Fortress and increasing visitation to this area throughout all seasons. There is significant potential to increase visitation as well as increase seasonal experiences for local and cultural communities – from outdoor pursuits in the winter to community events during holidays to private functions and conferences. With our partners, there are opportunities to create relevant services and provide suitable facilities, as well as to tailor Site activities to meet the varying needs and interests of current and future Site users" (28). It is interesting to note that while the 2001 Management Plan had expressed similar commitment to co-management to encourage operational efficiencies on-site, this more recent statement emphasizes the mutual and reciprocal benefits of collaboration in a more explicit manner.

Regional Communities: In addition to building local relationships with the Town of Louisbourg, the Fortress also recognizes the importance of collaborating on a regional basis, particularly as it is a component of the Cape Breton Field Unit of Parks Canada that includes the Cape Breton Highlands National Park, and four small National Historic Sites located elsewhere on the Island. While the headquarters for the Field Unit are located in the administrative buildings at the Fortress, staff work across the Field Unit from time to time to support programs and activities in the other sites. As well, they are residents of communities across the Island and have professional and social connections throughout both Nova Scotia and Parks Canada more generally, giving them a strong sense that they serve the Province and the people of Canada (Fougère, pp. 4, 9, 30; Historian, p. 16). Their most immediate and measurable means of serving regional communities is their capacity to draw tens of thousands of visitors annually to the region. The following annual attendance figures convey the impacts of the Site on the local economy (LeMoine, 2010):

1999: 135,563

2000: 123,328

2001: 120,551

2002: 124,836

2003: 115,145

2004: 103,105

2005: 103,231

2006: 97,225

2007: 97,371

2008: 98,456

2009: 88,379

In 2006, 73% of visitors were from Canada, 17.5% from the United States, and 9.4% from outside North America. The average visit length was just over 4.5 hours, and 95% of visitors report that the Fortress provided a satisfying educational experience (Parks Canada, 2010, p. 20).

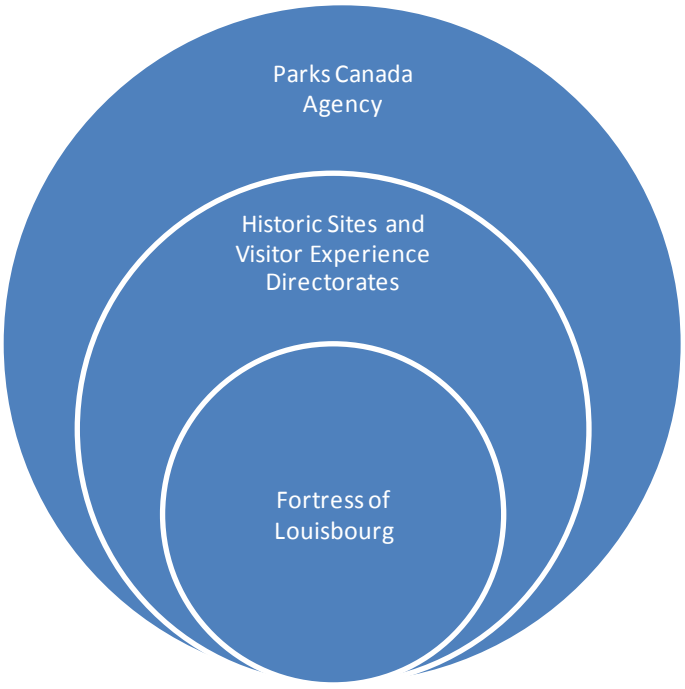
While attendance figures convey the widespread appeal of the Fortress as a destination attraction, they also indicate a troubling decline in visitation over time. Although the events of 9/11 have had a significant impact on tourism travel across the continent, the decline at Louisbourg began prior to that period, slipping from an annual average visitation of 128,000 in the 1990s to the current level below 90,000. This decline reflects a concurrent decline in attendance throughout the Parks Canada system and is attributed to an ageing, more diverse, and increasingly urban population (Parks Canada, 2008, p. 17) that is less engaged with and supportive of Canada's natural and cultural heritage.

Given the degree to which the local and regional economy are dependent on the Fortress to generate tourism and Site-related business activity, declines in attendance are seen to impact community relations. As the CR Manager notes, "When our visitation is sitting around 120,000–130,000, most [local business people] are happy. "I speak to you, you speak to me. It's a great day, let's do our thing, have a little bit of a chat about it." When the visitation drops off to 110,000, people will still say hello, but at that point they're starting to look after themselves a little bit. The business doesn't get a new coat of paint, the inventory goes down a bit, and [they] start to sort of withdraw. When the visitation drops below 100,000 which it has done, then things get very competitive. Everybody's scratching for the same dollar..." (p. 7). The steady decline in visitation is seen as one of Fortress of Louisbourg's greatest management challenges, for both internal and external reasons. It is prompting the Site to strengthen the visitor experience and to work more closely with the community to consolidate destination tourism activities. Staff recognize that both the Fortress and the

community stand to benefit by attracting people from away. The local community is "…only to a very small degree our clientele. It's not as if we were in Toronto and we're trying to enhance the relationship we have with those people who come to our museum on a regular basis, twice a year, three times a year. When we develop relations and incorporate ourselves in the community, [it is] for reasons other than just to develop another audience" (Harpell, p. 13).

REFLECTIONS ON THE SITE MANAGEMENT CONTEXT

Fortress of Louisbourg is one of 157 heritage sites that comprise Parks Canada's 'Family of Heritage Sites.' As such, this complex Site can be seen as a local system within two national specialized systems within an even larger corporate system. Locally, the Site is largest of the six properties managed within the Cape Breton Field Unit. The Field Unit Superintendent provides management direction to approximately 60 continuing staff and 250 seasonal staff who deal with the cultural resources, the visitor experience, and the Site management and operations at the Fortress.



While local management deals with the specific preservation and presentation of the Fortress, including collections development, research and care, public programming, and facility operations and maintenance, the curatorial aspects of the Site receive direction and support through the National Historic Sites Directorate (NHSD) which is based in Ottawa and has specialists working as consultants in the Atlantic Service Office in Halifax. The NHSD is primarily focussed on providing policy, planning, operational guidelines and historical,

architectural and archaeological expertise to ensure that cultural resources are managed to protect the Site's commemorative integrity in a manner that is consistent with other sites across Canada. The Cultural Resources Management Policy that is articulated through this national office provides a framework for heritage protection and decision-making, and both the Ottawa office and the Atlantic Service Centre provide the Fortress with conservation and training services to support on-site adherence to standards. Federal agencies that work in close collaboration with the National Historic Sites Directorate include the Federal Heritage Buildings Review Office (FHBRO), the Historic Sites and Monuments Board of Canada (HSMB), and the Historic Places Initiative (HPI). The Heritage Sites Directorate also coordinates activities and provides consultation to designated heritage railway stations, rivers systems, archaeological resources and grave sites of Canadian Prime Ministers.

Matters pertaining to Fortress presentation are supported in a similar ways by the External Relations and Visitor Experience Directorate. This Directorate was created in 2005 to strengthen the "facilitation of meaningful experiences for visitors with a view to creating sense of connection with an ever-growing number of audiences" (Info Source, 2009), and highlights the emphasis that Parks Canada is putting on strengthening the relevance of the entire Parks system to Canadians in the face of demographic change.

The Directorates for Heritage Sites and for Visitor Experience reside within the larger Parks Canada Agency that oversees the management of all of Canada's national parks, sites and marine conservation areas. Based in Ottawa and managed through a series of regional Service Centres, Parks Canada Agency supports more than 38,000 jobs across Canada (Parks Canada, 2008, p. 7), and has a mandate to "protect and present nationally significant examples of Canada's natural and cultural heritage and foster public understanding, appreciation and enjoyment in ways that ensure the ecological and commemorative integrity of these places for present and future generations" (Parks Canada, 2008, p. b). In addition to playing a coordinating role across all its component parts, the Parks Canada Agency oversees and centralizes financial and investment management, strategic agency positioning and planning, and evaluation and audit services (Info Source, 2009). Unlike many federal departments that rely on the Public Service Commission for staffing, Parks Canada has its own Human Resource Management Directorate which deals with staffing and employee development at the system-wide level.

Since Fortress of Louisbourg is nested within several large and intersecting bureaucratic systems, staff balance local, specialist and national priorities, policies, procedures and expectations on a daily basis. Several participants emphasize the value of the Parks Canada Orientation workshop that is required of all new staff in developing their understanding of the complex systems that shape their work. As the Historian notes, "It was very good in terms of connecting with people from other places in Parks; really broadening the perspective; understanding the organization at the national level, which I think is key for not getting too sunk in your workplace concerns and being aware that there is a national mandate...a national level at which we have to function; that thinking on that level might not result in decisions that thrill us at Louisbourg but that we have to see things that from perspective" (p. 12).

The executive team at the Fortress is comprised of the Superintendent and the Unit Heads for Cultural Resource Management, Visitor Experience, and Engineering Works as well as for other operational aspects. Core members of this team, including the Superintendent and the Heads of CRM and Visitor Experience are relatively new to the Site, having moved there from other roles within Parks Canada. A number of participants note the significant impact of a new management team. "From the very top management levels there is such an intense awareness that we really do need to shift our practice to be relevant, to continue to meet our mandate and to serve Canadians" (Historian, p. 16). The Curator/Collections Specialist echoes this, observing that "...we're in the midst of some of the biggest changes that have taken place. This is year thirty-six for me, and these are some of the largest, most sweeping changes in that period of time" (p. 4). The Historian observes that a new management team is positioned to resolve long-term problems that have impacted Site management. "This is following from a period of ten years, maybe more, of absolute...stasis, where the organization had been profoundly affected by cutbacks. At the same time, visitor levels were pretty stable, so things seemed okay. They were cutting back people, but things seemed okay on the surface. [Remaining staff] had to keep delivering the same things that a much larger group had delivered in the past. So that all added up to nothing new – we could not deal with anything new. There still are some remnants of that, particularly at the operational level, where we still are a much-reduced complement...you've got to think differently" (p. 16).

The changes that the new management team is seeking to implement are "new creative ways to manage the resource that we have, within the organizational mandate that we have" (Manager, p. 1). Internal management priorities include strengthening organizational culture and capacity, while more general Site priorities include building meaningful visitor experiences, increasing attendance (and therefore revenues), improving community engagement, and finding innovative strategies to ensure the long-term preservation of the cultural and natural resources of the Site in the face of a range of threats including degradation and rising sea levels.

The interest in change is stimulated by corporate priorities. The CRM Manager indicates that much of the impetus comes from "...the Agency itself, as it has recognized [the need for change] and tried to find ways to make it work. More recently the renewal of the National Historic Sites and the new integrated mandate that we now follow have given...opportunities to learn, have ensured the tools are in place, and have instructed managers to be more creative and reach out to employees as well as other outside partners" (p. 10).

Reaching out to employees and involving them in change processes is seen to be a particular challenge. At the heart of new approaches is leadership in creating a workplace that is supportive of change. "We're only now, after the two years I've been here, starting to build that leadership. It has been a struggle. In other words, we don't have the capacity to change [right now]. We're building the capacity to create change" (Manager, p. 6). The CRM Manager reflects on factors that strengthen staff capacity for change, saying "you have to give them tools, you have to create the workplace that will allow this to happen. That involves things like the training, the internal communication, the internal consistency to allow [teams] to grow and be effective. There are lots of things like fences, barriers. "I'm here, you're there. We don't get to chat all the time, we don't get to communicate." If we don't have internal consistency, whatever projects we take on are...not going to be achieved to their fullest. We have to be able to create an atmosphere of trust, learning, challenges, fun" (p. 6).

While change is slow, it is seen to be happening. "We're putting the pieces in place. Each day that goes by there is an improvement in capacity. Once you have the capacity to create change, change will come much more easily. The other thing is that...miscommunication or non-communication is the root of all discontent. So the thing that a sound leader has to do is to not just lead by example, that's an old cliché. You have to get

out and you have to communicate. People have to know what is going on. They have to feel part of the organization" (Manager, pp. 6-7).

One of the changes that is also underway is a redesign of the site's approach to public outreach in light of a system-wide emphasis on visitor experience, in keeping with Parks Canada's recognition that public support is essential to the long term sustainability of national parks and sites. Visitor experience is defined as "...the sum total of a visitor's personal interaction with heritage sites and/or people, an interaction that awakens their senses, affects their emotions, stimulates their mind and leaves them with a sense of attachment to these special places. Activities include the provision of high quality pre- and on-Site trip planning information, reception and orientation, interpretation, campgrounds, infrastructure, hiking trails, opportunities for recreational activities, visitor safety and the ongoing post-visit relationship. The meaningful experiences fostered by these activities lead to a sense of relevance and connection to Canada's system of special heritage places" (Parks Canada, 2008, p. 26). The traditional functions of interpretation and education have been subsumed within a new Visitor Experience Unit at the Fortress, and a new manager is exploring strategies to create a more holistic visitor experience that should, among other things, strengthen attendance and bolster regional tourism.

The heightened emphasis on visitor experience is regarded with some uncertainty by interview participants. Not only is it seen to be creating considerable disruption for educational programs staff who are required to apply for new positions (Curator, p. 4), it is altering the long-standing balance between conservation and education functions on the Site. As the CRM Manager notes, "we have the largest Cultural Resources team across the country... What we do is looked at by every other site in the country. [Colleagues say]... "if they're doing it in Louisbourg, we should be doing it here." We are the leaders. We carry the Cultural Resources flag, only because we're where we are. ...We're looked upon as innovative, and where the rest of the sites have to be. But we're now threatened by the visitor experience steam roller that's rolling through the Agency. And every time somebody retires in CRM I have to have a good reason why that position should be filled" (p. 13). One of the key reasons that CRM staff cite for ensuring a strong balance between cultural resource management and visitor experience is the importance of curatorial and conservation research. "Research is fundamental to interpretive quality and public programs. Research is fundamental to the furtherance of knowledge. That's stated [in Parks Canada Policy]. I'm having a hard time now

seeing that actually in practice" (Manager, p. 14). The definition of Cultural Resource Management within the Parks Canada context is: "Generally accepted practices for the conservation and presentation of cultural resources founded on principles and carried out in a practice that integrates professional, technical and administrative activities so that the historic value of cultural resources is taken into account in actions that might affect them. In Parks Canada, Cultural Resource Management encompasses the presentation and use, as well as protection, of cultural resources" (Parks Canada, 2010, p. 15).[42]

A strong commitment to cultural resources in the face of increased attention to visitor experience is also emphasized by the Conservator, "We're very protective, but in all fairness, so are the curators. I don't know what it is, but we get very protective of the collection. I must say, [new priorities] are visitor experience-based. You'll see that across Canada – now we're providing experiences. Well, my first words to [the CR Manager] were "how does this impact the collection? Are we going to start using the collection until it's destroyed and then toss it out?" I'm still not comfortable with that whole business, I'm still not comfortable" (p. 11).

The CR Manager is sympathetic to this concern, although he recognizes that contemporary cultural resource management must be increasingly concerned with balancing conflicting priorities. "If I were hiring tomorrow, I'd want somebody who is creative, who doesn't have a box around them. Who has a totally different way of looking archaeological resources, museum objects, curating, conserving, storing things in the cultural resource field...we truly are in a new arena. ...It took me years to see the forest for the trees…Today the challenge for the archaeologist is not to get entirely wrapped up and focussed on their immediate concerns which, from an archaeologist's perspective, is protect and record, protect and record" (p. 1). Part of the challenge in achieving an integrated approach is seen to be long-term professional silos that are both occupational and physical. "Every professional has tunnel vision, because they're a professional, whether it's the historian, the curator, the archaeologist and so on. They're very special people and it takes coaching and guidance to come into the 21st Century" (Manager, p. 2).

Impacts of Economic Downturn: As noted, the Site has been subject to cutbacks over the past decade, in part due to the decline in attendance revenues. "It's a big drop...and it's a

[42] The Cultural Resource Management Program at the University of Victoria addresses these principles in a general sense; it is not specifically aligned with the policies and procedures used for CRM within Parks Canada.

real concern to everyone in Parks from the CEO on down, and certainly to the Field Unit Superintendent in this area. So...they've developed an entirely new Directorate in Parks Canada to address...visitor experience organizational deficiencies. These changes that we're just talking about now with staff and reorganizing positions and so on are a reflection of that" (Curator, p. 5). Such economic pressures and potential changes inevitably influence staff morale. The CR Manager notes that "that mood...kind of works its way into the workforce as well. So visitation goes down, budgets start to get squeezed, people are in fear of losing their jobs. Or they're in fear of getting moved to a job they might not like. Or they're in fear that they're not going to be given the tools or the training or whatever they may require to do their job. Attendance kind of drives a lot of things around here. However, if we do the things that we're tasked to do, and do them well, and have fun doing it, visits will take care of themselves to some extent. I'm not looking at "build it and they will come" but a creative, exciting, fun staff will inform and can make a huge difference in the workplace and will make a huge difference in our attendance numbers" (p. 7).

Economic pressures also impact the capacity to care for and present the Site. "Money is not what it used to be as far as availability of funds. Our buildings and our facilities are at an age where many of them have already been recapitalized to the tune of hundreds of thousands of dollars – individually, not just as a group... Some of them we're looking at still have many of the same problems as far as water penetration and so on [even after repair], so the managers here...have to think seriously about some of those things. (Curator, p. 9). Fougère also notes that "...with the lack of space and the cost of putting up a brand new museologically appropriately structures, it would take millions and millions of dollars that we just don't have. In a lot of cases, we're very much like a small museum...we don't have a lot of money to do things. We're better off than smaller museums and we try and help smaller museums when they ask for advice, we have something to give..." (p. 14).

Such pressures also impact the availability of funding to support training. Fougère does not perceive that funding is available to cover the costs of travel to take on-campus courses at the University of Victoria although many Parks Canada employees have participated in this manner. The Conservator notes that "Specially now with cutbacks in budgets, it's hard to travel so you use the Internet a lot. If you're passing through areas, you make a point of dropping in [to visit colleagues]. But it's very informal and tends to be if you're motivated..." (p. 2).

Planning: Like all Parks Canada sites, Fortress of Louisbourg works within a comprehensive Management Plan that is renewed every five to ten years. As the most recent plan was approved in the House of Commons in 2001 (Parks Canada, 2001), the Site is very focussed on the preparation of a new plan that will be submitted for approval in 2010 (Parks Canada, 2010). Planning is a strongly supported function at all levels because it provides a systematic means by which corporate and local priorities can be reciprocally developed and integrated. Standardized templates are provided for management, business operational and other plans, and staff located in the Atlantic Service Unit are closely involved in the conceptualization, consultation and production of planning processes and documents. For the preparation of the 2010 Management Plan, a cross-functional team has been working collaboratively to develop strategies that adapt corporate priorities within the context, resources and capacity of the Fortress. Public consultation, coordinated and facilitated by Parks Canada planners, is seen as an important element in the planning process. "Open houses and stakeholder meetings held between 2007 and 2009 provided opportunities for a broad spectrum of public comment on the draft management proposals. Further discussions with the Nova Scotia Mi'kmaq community, provincial government departments, the Acadian communities and various partners and stakeholders helped to refine management direction for the Site. Every effort has been made to consider all input received during the development of this Management Plan" (Parks Canada, 2010, p. 8).

Fougère, who is participating on the planning team, notes that "There have been quite a number of consultations and brain-storming sessions for employees for this particular plan. I'm new to the process. This is my first time on the management planning. I was asked to sit on the Management Planning Board [and] I thought it would be a great honour to do that. I'm very pleased that they've trusted me to have input from an employee perspective. I was part of the visioning sessions that we've had. And part of the management side of it as well. It's really interesting to see how key strategies come out of brainstorming, and to see how our plan, as employees, fits with the plan of stakeholders and of communities and special interest groups likes the Mi'kmaq and the Acadian communities... And how that's all put together in a master plan and how that has an impact on where Parks Canada is headed..." (p. 26).

REFLECTIONS ON THE PROFESSIONAL CONTEXT

Fortress of Louisbourg is an historic site that, among other things, includes a small museum facility that houses and interprets some of the 4500 historical and archaeological artefacts that date from the 18C. While the Site makes a distinction between its museum and other presentation areas, the whole Site nonetheless may be regarded as a museum as it clearly fits within the Canadian Museums Association definition that includes "natural, archaeological, ethnographic and historical monuments and sites" (CMA, 2009a).[43] The way in which the Fortress is organized also reinforces its adherence to museum principles and practices. The Cultural Resource Management unit is focused on collections and Site stewardship and employs curators, researchers, archaeologists, collections specialist and technicians, and conservators to ensure the integrity and safety of the varied historic resources. The Visitor Experience area is focused on the presentation of the Site and includes program planners, educators and interpreters. And like other museums, the administrative offices include staff who deal with facility and operations management, marketing, human resources, budget and leadership. Despite its size and scope, Fortress of Louisbourg has much in common with museums across Canada and beyond.

Interview participants however are tentative in claiming 'museum professional' status. When asked if she regards herself as a museum professional, Fougère states "I tell people that I work for Parks Canada, that I work for the people of Canada, and that I work at Louisbourg. I tell them the education that I've had through UVic, that I've gone through the CRM Program, [and] how much I enjoyed it. I don't really say to people "...I am a collections technician at the Fortress of Louisbourg. That's not who I am. I'm more of a people person. If

---

[43] The Canadian Museums Association (2009b) defines 'museum' in the following way: "Museums are institutions created in the public interest. They engage their visitors, foster deeper understanding and promote the enjoyment and sharing of authentic cultural and natural heritage. Museums acquire, preserve, research, interpret and exhibit the tangible and intangible evidence of society and nature. As educational institutions, museums provide a physical forum for critical inquiry and investigation. Museums are permanent, not-for-profit institutions whose exhibits are regularly open to the general public. This definition encompasses institutions that pursue similar objectives and accomplish most or some of a museum's functions. Accordingly, the following are also recognized as museums:

- Exhibition places such as art galleries and science and interpretation centers;
- Institutions with plant and animal collections and displays, such as botanical gardens, biodomes, zoos, aquariums and insectariums;
- Cultural establishments that facilitate the preservation, continuation and management of tangible and intangible living heritage resources, such as keeping houses and heritage centers;
- Natural, archaeological, ethnographic and historical monuments and sites.

people say "what do you do?" [I reply] "I work in collections"...I tell them that I work with the furniture, the paintings... People seem to be fascinated more with what I do, not necessarily with my title" (p. 4). Fougère's reluctance to identify with an abstract professional position title is shared by her supervisor, the Curator/Collections Specialist, who remarks that "I have some personal thoughts about the use of the term 'professional'. To what extent are we calling ourselves professional? To the extent that we get paid for doing this? I think someone who can really claim to be a professional is someone who goes to jail if they don't do their job right, like a lawyer for instance, or a doctor, or possibly a nurse...I could be in little bit of trouble if I mess up big time, but I'm not going to jail, and I'm not going to suffer any dire [consequences]. I probably won't even get fired…there's no jury of my peers, or police who oversee what it is that I do...I do see myself as a participant in a community of people who are involved in doing museum work" (p. 3).

The Conservator, whose job is aligned with a highly specialized area of museum practice and who has completed graduate museum studies, and apprenticed and trained to build her specialized skills in wood conservation, is more comfortable with notion of professional status, but remarks that Louisbourg's geographic and organizational isolation from the mainstream of professional discourse is a concern. As a result, she and the archaeology conservator on staff make an effort to attend the annual training workshop and conference organized by the Canadian Conservator's Group (IIC-CG), noting that "we do need to be current. For the collection this is a necessity, it's not an option" (p. 2).

The Conservator is the only person I spoke with who holds a membership or participates in an external professional organization. This appears to be largely because Parks Canada provides a comprehensive professional framework for museum practice that can be seen to replace the kinds of external supports and social networks offered for staff by professional associations. Codes of ethics and standards of practice are articulated for most cultural stewardship tasks; an internal training system seeks to ensure that skill sets match job requirements; symposia on emergent practices stimulate creativity and professional contributions, regional service centres provide "professional services to Parks Canada sites in the fields of archaeology, curatorship, historical research and conservation of historic objects" (Parks Canada, 2009a); and staff in similar positions can interact across sites to build professional networks. The size and scope of Parks Canada's cultural stewardship responsibilities, and the resources that it has been able to dedicate to appropriate practice,

position it as a leader in cultural stewardship principles and practice. Both its approach to articulating commemorative integrity and its Cultural Resources Management Policy provide useful examples of nationally applied frameworks for heritage resource decision-making that inform daily practice at the Fortress. Not only are these implemented throughout Parks Canada, they are also used more broadly across the cultural heritage sector as models for practice.

While Parks Canada has been very thorough in setting out frameworks for practice, the Curator/Collections Specialist, who completed the University of Victoria's *Introduction to Museums Studies* course in 1992, reflects that "One of the very useful things personally with the *Museum Studies* course for me was to see that [policies and procedures] were not just peculiar to Parks Canada. Parks Canada has those directives, those CRM policies notations and directions for a reason. And the reason is that...these are generally accepted museum practices in the museum business. I don't find them to be at odds at all. I don't understand that anyone thinks that we're restricted by Parks Canada policies in what we can do as far as collection management is concerned. It's not Parks Canada policy – it's Parks Canada adopting what are primarily generally accepted museum standards and procedures" (pp. 2-3).

Nevertheless, in this structured environment, employees tend to look internally for both guidance for practice and social networks. It is interesting to note that all the interview participants have worked with Parks Canada throughout their careers, and do not draw on extensive external professional contacts or networks. As the Conservator notes, "we're encouraged to look within Parks first" when seeking advice (p. 2). Where external professional relationships exist, they tend to be linked with personal friendships, "...those sort of connections have happened naturally but you use them professionally" (p. 2).

In addition to being geographically isolated, Fortress staff are also somewhat isolated by virtue of the specialized nature of their practice. As the Curator/Collections Specialist notes "we're more indined to associate ourselves...with first other parks and then other large national museums, and we've been a bit on the snobbish side about becoming involved with the provincial museum folks here in Nova Scotia. They're all great people and they do some very interesting things, and they are quite active and do a number of workshops and seminars and learning section of various kinds. We've been a little bit on the standoffish...I don't really know why, but it seems like we have been to me" (p. 3). Part of this isolation may be due to the unique character of the Site. "The period of our commemoration is the first half of the 18th

Century and the only other place in the country that has that kind of historical time period would be Quebec City. We should have perhaps a lot more interaction with Quebec, but we don't. Perhaps language might have a bit to do with that. In a nutshell, [we don't do] much liaising with other Parks in the country" (p. 3).

Louisbourg also has a reputation for innovation in both cultural resource management and public programming based on its efforts to create an ambitious living history program. As the Historian notes, "the truth is that it was created. The fundamental purpose was job creation, and it sure worked on that front because there was lots of work to do here. The thinking was very ad hoc. They'd get into a situation and then think about "why are we doing this, and how do we get the most out of it? How do we keep going?" A lot of what Louisbourg is was specifically created here, so you read about Plymouth, and...about a lot of New England sites, and you look at what Williamsburg is doing, but there are some things about Louisbourg that are so specific to this place that it really is learning from the people who are here, and learning as you deal with it. It's part of the process."(p. 5-6). Not only are staff looking internally for best practices, they have opportunities to contribute their expertise to Parks Canada's evolving policies and standards. "We get asked, we get to become involved, usually by invitation. If we want to accept it we're involved in some things like the development of our artefact information system" (Curator, p. 3).

The challenge of working within this system is noted by the CR Manager who observes that "it's a government agency. Many times a young creative professional comes in as a cultural resource manager or some related field and sometimes they get shocked that they can't do this, they can't do that. There are very strict protocols, guidelines and standards to follow. If you're not prepared to work in that type of world, then you're with the wrong group. That doesn't mean we turn away the brightest and best of the profession. I think there's room to work within the Agency, absolutely. [My colleagues] are living examples of how professionals can operate within their own personal career goals and align them with the Agency's goals. [But] it's a challenge and not everybody can do it" (p. 4).

Reconciling professional values and ethics with conflicting corporate priorities and practices is one of the challenges that the CR Manager is alluding to. "That's a challenge, but the Agency puts up no barriers to that. However, you have to be strong-willed. I'm not going to jump on anybody within this Section for standing on ethics, for standing on professional standards that they must and should follow. Nor will Parks Canada. But...it's always a world of

compromise" (p. 4). A particular challenge for some is finding the appropriate attitude and approach to working with the reconstructed buildings and collections that comprise much of the Site. As the 2010 Management Plan notes "...given the size and scope of the reconstructed town site and the animation programs, reproductions (buildings, furnishing, and costumes) play an important role at the Fortress of Louisbourg. While these items do not strictly fit the definition of cultural resources, the desire for authenticity often require[s] that they be managed in a similar manner" (pp. 15-16). The CR Manager reflects "As professionals we strive to create authenticity. But really what we're dealing with here at Louisbourg and within Parks Canada is a *sense* of authenticity. When you walk this really narrow line that's called authenticity, and you don't want to get off of that line...you won't survive. But if you look at it from a *sense of authenticity*, and now walk the line, you become much more flexible. As a professional, you can still maintain your professional standards and create this sense of authenticity – I think you can. Not everybody would think that way. But the professionals that we have here today are excellent examples of how we're creating this sense of authenticity and still maintaining their professional standards" (pp. 4-5, my italics).

One of the key roles for professionals in this context is to ensure that the Site honours the integrity of all types of historic resources from the archaeological remains, to the reconstructed buildings, to the 18th Century collections, to the objects reproduced as furnishings and living history props. "We have something to offer here that is not offered anywhere else in the world. It's up to the professional CRM persons here to keep the Superintendent in line, to keep the Cultural Resources manager in line, to keep the Engineering and Works staff in line. That's their responsibility, whether it's stated or not. At the same time, a professional has to be able to work within the parameters that are laid down – there's the challenge laid out before you. It's no good to...rant that "you can't do this, you can't do that" because it won't work. We have to find ways to make it work. We're not in the business of saying "no" to anybody, we're in the business of making it work" (Manager, p. 5).

REFLECTIONS ON ORGANIZATIONAL CULTURE

Both the size and the layout of Fortress of Louisbourg impact its organizational culture. Depending upon their areas of specialization, some staff are housed within the Fortress compound itself, while others work in various buildings in the administrative

compound hidden away in the forest, approximately one kilometre from the Site. Staff can drive between the Site and the administrative area in the winter season, but are shuttled by bus in the summer to ensure that cars do not disrupt the 18th Century ambience that shapes the interpretive experience.

As staff tend to be clustered according to their specialization, a strong sense of collegiality within small working groups seems evident. Staff who work with collections, for example, are located within the Site itself and appear very comfortable in their social and professional interactions. As Fougère notes, "I've had very positive people around me and the people around have a huge impact on your career, and what you do and how you do it. I've been very fortunate that way, working with people" (p. 11).

Interactions across working groups seem somewhat less comfortable, despite team approaches to many projects. As the CR Manager notes, "An archaeologist brings something to the team, an historian brings something to the team, and engineer brings something to the team, and when the meeting is over they all go back to their places and do their own thing again. That doesn't work. ...We've learned that doesn't work to create the product... The product is a result of integration. If you bring people in at opportune times and then they go back [to their specialized practice], you lose something in the translation" (p. 5). In order to strengthen a sense of team across the Fortress, the new senior management team is considering two strategies. One is to encourage more effective communication both vertically and across working groups. "...you have to get out and you have to communicate. People have to know what is going on. They have to feel part of the organization. I know this is old stuff, but we just haven't been doing a very good job of it. We come in here and are going to make a whole bunch of changes in the way we do business, [but] the staff just want to be left alone: "let me do my job" (Manager, p. 7). The importance of communication is also recognized by the Conservator who notes that the "previous management team tended to hold their cards very close to their chests" (p. 7), which limited interactions across the Site and even within adjacent buildings. "Most Louisbourg employees, when you talked about communication, would all just role our eyes and wonder how we can be so isolated and not talk to each other about what's going on [across various units]. Yes, you get the impression [of silos]... There is a geographic separation [between the Site and administration buildings], but some employees will say that fence just outside the window is [also] a real big divide [among buildings in the administrative compound]" (Conservator, p. 7).

Removing physical barriers that divide working groups is a second strategy to strengthen organizational culture at the Fortress. "When you look at the work environment here...we've got Visitor Experience over on the Site. We've got Archaeology over there. We have History over here. We have the Louisbourg Association partner over here. Everybody is moving [around]. How in the name of heavens can you create any kind of functional, effective team with all these barriers we have around here?" (Manager, pp. 8-9). To resolve this fragmentation of the workforce, senior management is seeking ways to cluster working groups. "We've been charged to find a space where we can move most people together to create Cultural Resources and Visitor Experience, and some Asset Management into one facility on the Site...right in the middle of the business, that's where the action is. We're going to make an attempt to move everybody together. If we don't do that, we'll continue to throw up [barriers]...close our doors, create this environment of giving when you have to and going back when you don't have to. By looking at an open office concept for 20-30 of our staff, we're hoping to create this internal consistency" (Manager, p. 9).

By improving communications and creating synergy across work groups, the CR Manager hopes to build trust and strengthen creativity."What we have to do here is to create a workplace that allows – I don't like the word empowerment – but that's basically what we're talking about. We're trying to find a cool way to empower people, so that they're not afraid to come forward, that their ideas will be taken seriously...that takes years, believe it or not. It takes years" (p. 7).

As the Fortress is open to the public from late spring to mid-fall, approximately 75% of its staff are employed on a seasonal basis, many as interpreters who don period costumes to animate the Fortress. Many of these staff live locally and rely on the Site for employment year after year. Integrating this large and seasonal workforce with the organizational culture presents particular challenges. "To most people it's a job. ...That's the case because most of the people here are seasonal. It's a pay cheque. You'll draw unemployment all winter. You'll go back to work in the spring" (Manager, p. 7).

During my visit, participants and others were discussing a news release indicating that a significant number of federal employees, including 75% of federal executives, are experiencing depression or other mental health issues as a result of employment-related stress, anxiety and burn-out (National Post, 2010). The CR Manager comments on this, saying "They call it the biggest problem? I think that's a little bit off-base. But it's a problem. I don't

understand why it is...but I can see what happens. I see it. I've lived it. But from the underwater team that I was part of...that didn't exist" (p. 10). However, he does note that morale and capacity for innovation at the Fortress was been impacted by both a directive management style and budget challenges over the past two decades. "The short of it is, [staff] were not given the learning opportunities to do anything creative [or] new, [or to] move on to other jobs, it was not happening. That's not uncommon. That's not particular to Louisbourg. It's a sort of a result of management style…" (p. 9). He finished this thought by observing that new human resource strategies of the Parks Canada Agency, combined with new leadership, has "turned this around."

Fougère echoes the observation that the organizational culture of the Fortress is becoming more positive and supportive under new management, saying "if you have a good strong supervisor and manager and a good leader, that's what changes that around" (p. 13). She reflects that "I see people working extremely hard, I really do. I think if you have a strong leader in your Superintendent who can give you words of encouragement and say 'thank you' and who can see the good in you, I think that's what people are looking for. I think that's where it was lacking...If you work for a faceless bureaucracy for lack of a better word, then you're sort of left as a number and you feel that you're just here, you're doing your job. If somebody never says "thank you" or gives you positive encouragement and feedback and training, you're only approached when something goes wrong, then that has a big negative impact on people. But if you have a leader who is passionate…and...says "wow, good job" that's positive reinforcement in the workplace and I think that's what people need more of" (p. 12, also 25).

Recent changes in Parks Canada's approaches to human resource management are attributed, in part, to employee surveys conducted within the past ten years. As Fougère notes, "One of the issues identified was morale in the workplace. People are feeling down, so these are areas where Parks Canada is trying to address issues with workplace wellness, with incentive programs, [and] employee recognition. (p. 25). She notes that "We have an employee workplace wellness program that's just beginning. We had a committee before that, and it had looked at health and safety issues. We'd bring in people to talk about health issues in the workplace, and nutrition, and how all of these things impact the well-being of a person and in your job performance in the end. The Workplace Wellness Committee is brand-new and so they will have terms of reference, and once they do that, they're going to start

working on things that help people in the workplace" (Fougère, pp. 24-25). As well, "Parks Canada has the Employee Recognition Program that is motivated by the staff. ...It is a really nice recognition program, and so far two staff people have received that award for facilitating memorable visitor experiences. We'll see what happens this year."

Job Satisfaction: While Fortress of Louisbourg staff experience communication and organizational issues typical of many large bureaucracies, interview participants are quick to emphasize the pleasure that they derive from their work. For example, the CR Manager remarks that he "jumped at the opportunity to come back here [to the Fortress] and do some good I hope, because of the change that PC is going through" (p. 4). He also notes that "the Cultural Resource Section here has the best staff at Fortress of Louisbourg. I'm blessed with the top employees in this organization. There's nobody better in any other function" (p. 12).

Fougère emphasizes both the pleasure she derives from working relationships and from her involvement with the collection. "I've had twenty wonderful years here, working with wonderful people. ...I love working with the collection. I love how the objects tell little stories on their own. I love talking to the people about the collection. I love interacting with visitors. I like the planning. I like the people I work with. Sometimes it gets a little frustrating when it takes somebody a while to understand your point of view...but then once they do, or once you come to an understanding with somebody, it's "okay, now I know what you're talking about." Twenty years goes by in a flash – I can't believe it's been twenty years when you really enjoy what you do. When I tell people what I do, they say "Wow you have a fabulous job" and I say "Yes I do." So really it's a combination of all things put together, and I think no matter where I work here, whether it's with Visitor Experience [in the temporary project role], or whether I'm with Cultural Resources, if you really focus on something and you put your heart and soul in it and you've got good people around you, you're going to excel" (p. 11-12). Later in the interview she reflects, "I love the Site, I miss the Site while I'm over here [on special assignment]. I miss working with the collection and researching material culture and making reproductions and watching that whole process – it's fascinating. I don't think I would have spent twenty years there if I wasn't happy" (p. 38).

The Conservator indicates that she finds her work very absorbing and enjoys many of her daily tasks to the point that she is happy to work through breaks. "I remember one of my first days, someone coming to me and saying "Well, it's break-time." I thought "I'm in the middle of something. I don't take a break now, I'll do it when it's convenient." Who watches

the clock?" (p. 15). The Curator/Collections Specialist also reflects that he finds his work very interesting, while the Historian comments that "It's exhausting sometimes and certainly frustrating sometimes, but ultimately I'm very very motivated by the idea of inspiring people to have an understanding of the history of the landscape, the connection to the place. I'm very motivated by that, I'm fascinated by the research, so it's a really good thing" (p. 5). She goes on to observe that "I do think one of the characteristics of historians is that, by and large, they're fascinated by everything. We don't seem to distinguish – we find everything interesting."

Individual Autonomy and Initiative: As Parks Canada creates a framework for practice with "very strict protocols, guidelines and standards to follow" (Manager, p. 4), the interview participants work in a largely 'other-directed' environment. Directives from the Parks Canada Agency and its Cultural Resource Management, Visitor Experience and Human Resources Directorates, set out system-wide corporate priorities and expectations for professional practice. Site management plans set out local priorities and strategies for annual accomplishments across working areas. And Section Heads work with their staff teams to determine the outcomes of regular and project-related work needed to contribute to Site goals within their areas. The chain of command extends from Ottawa to local offices and is clearly recognized by interview participants. As noted earlier, staff have participated in orientation sessions that build their understanding of the policy framework that shapes their day-to-day working lives (Historian, p. 12). They have also taken Parks Canada training that provides a rationale for the principles and practices that guide their work. "We've all had to have CRM policy training...There is a base of courses that employees have to have. Usually if you're hired into the Cultural Resources section, you get CRM training on policy…I think that's important because people need to understand why we're doing it. If they don't understand why, then they really wouldn't have a lot of perspective as to why they're doing anything" (Fougère, p. 16).

Within the Site, performance planning is increasingly used as a tool to determine workers' priorities within the context of Section and Site goals. This process is undertaken through a system-wide evaluation and planning tool that is expected to be annually administered by the supervisor. Fougère reflects that "there was a while when evaluations weren't really getting done and you just sort of do it informally with your boss. So they weren't required. They were in the beginning, and then they sort of stopped, and they started

them again" (p. 10). Fougère's supervisor, the Curator/Collections Specialist, also notes that the performance planning system is changing, particularly with the placement of increased emphasis on visitor interactions. "We're supposed to sit with the employees and our managers are supposed to sit with us to develop plans... You know, sometimes a manager will be enthusiastic about that but more often, no, not so much...There are some significant changes, particularly in our Visitor Experience Section and I think the majority of the planning and thinking at this institution is going in that particular direction right now, giving the rest of us a break from the assignment of goals" (p. 9).

Although performance plans are now seen to be "an absolute requirement" (Historian, p. 10), their application continues to be somewhat inconsistent. "I think there are still some managers who do not do that. I'm just judging by the emails reminding people that these things have to be done. They keep coming and coming. I know that we often get busy and they don't go in when they're supposed to go in. And it is very manager-dependent, because I'm thinking that my previous manager was not as dedicated to that kind of structural stuff, and I don't think it got done very often. With more senior staff, people who have been working for twenty years plus, they do develop a little bit of cynicism and contempt for that kind of review" (Historian, p. 10). The efficacy of performance planning is also impacted by the degree to which the achievement of goals is supported and monitored. As the Historian notes, if the planning goals are not accomplished, "I don't think there's a consequence ...It's just put forward to the next plan" (Historian, p. 10). Since Parks Canada is placing greater emphasis on supervisory protocols and skills, and since the new management team is encouraging the effective use of this system, improvements in follow-up are being observed. "I must say that [the CR Manager] is my first supervisor that has even sent an email out at mid-point saying "How are the goals going? Are you on track?" (Conservator, p. 6).

While formal annual work planning seems inconsistent, regular informal interaction among supervisors and staff appears to be a more common and meaningful approach to coordinating work. The degree to which work has been effectively planned between workers and supervisors over the years however has been impacted in the past by leadership at the Fortress. "It was kind of uneven. I think we've had some real challenges in terms of having good direction. Ideally if you're getting really good direction from your senior management, it's not so much that you need to be closely supervised, but you do need to know what the organization wants to achieve. I think we've been suffering from a lack of good direction

which has then resulted in the need for intense scrutiny at the functional level because people are trying to figure out what they think the organization would like or perhaps figure out what they can get away with. [They think] "what's the minimum requirement, since there's no clear project in front of me?"" (Historian, p. 13).

Fougère is enthusiastic about the nature and quality of supervision that she has received in the Collections area. "I have a lot of respect for [the Curator/Collections Specialist] as a supervisor and as a colleague in the field. He has been wonderful to work for, I have to say. He's given me freedom, he's given me good sound advice all the time, and he's good to sit down and talk to, and he does give a lot of encouragement. (p. 23). "I think if you have a lot of dialogue with the person you're answering to, [and] if you get their approval at key steps along the way, then I think you're fine. That's something that I've picked up" (p. 10). She also observes that as she has grown more experienced in her work, she has gained more autonomy in day-to-day practice. "[The Curator/Collections Specialist] is a very unique individual. He let me go a lot on my own. I would sit down and talk about what needed to be done for the day, and I could go off and do my tasks at hand. I knew what I had to do. He always looked at us as a team. I think that was very positive in itself, so we worked on things together, or he'd say "Can you take care of this for me today?" He gave me responsibility in that way. His encouragement meant a lot to me as well and his positive reinforcement" (p. 2). She goes on to describe how she approaches her daily work. "I like to sit and I can plan out my day and I can work with very little supervision that way unless I run into a problem, and then I'll get somebody's opinion...I will go to my supervisor and say "What do you think? What do you think of this?" He'll say "okay". He'll give me the responsibility to go off and do it. I think if you prove yourself every time you do that, in a positive way, then they give you more room to grow. Knowing that you've had some training in that area, they give you a little more space. If you report back on your progress to say "oh look, I've done this and that, this is working fine" they know what you're doing...I think that the respect of giving your supervisor updates [is important]...if they know where you are and you're doing fine, I think you get a little more leeway as time goes on. That's a trust and you earn that, and you gain knowledge as you go" (pp. 8-9).

In ranking the degree of autonomy that she is able to exercise in her work, Fougère indicates that she has considerable capacity to make decisions relating to what she does on a day-to-day basis (Davis, 2010a). This is particularly the case in handling and presenting the

collections. "…it's easy because there seems to be less outside involvement for us with regard to what we want to do with the collection. Curatorial decides basically how [policy is applied]...we have the freedom...to display the collection, or if we want to change a room around. If something is against a window, we say "that's not a good practice to have the light flowing in against this tapestry. Let's go back and see where we can move that." Or [with] a painting in a stairwell, we'll say "okay, that's not a great place for that painting, let's move that." Those are smaller [decisions], they don't have an impact on what everybody else is doing. It impacts that specific department and what we do..." (p. 35).

Other staff also reflect that they have considerable autonomy in their day-to-day work. The Historian, for example, notes that she chooses her own methods in tackling research projects and doesn't "...feel like I'm getting a lot of pushing in one direction or another. Certainly my manager wants to know what I'm working on, and wants to be able to present that higher up" (p. 13).The Conservator comments that "because departments don't communicate well, there's a degree of isolation [day-to-day] so you can sort of implement things. I've heard more people say lately "it's easier to ask for forgiveness than for permission"" (p. 15). When asked what the boundaries of her autonomy might be, she notes "probably my own good sense, frankly. There are times when I say "yeah, I should probably run this by somebody" but other than that...I'll go through the collection and make recommendations. It's that kind of philosophy [at the supervisory level] "well, you're the professional, you tell me" (Conservator, p. 15). The Conservator goes on to reflect that it would be difficult to work elsewhere because her capacity to be self-directed in her work is well established at the Fortress. "...our practice has become so free. We're so free here" (p. 15).

While Fougère is self-directed in her daily work, at other times, particularly with artefact conservation issues, decision-making must involve others. "You need other peoples' perspectives on how to take care of that collection. It's never just your own decision. For example, if we're looking at an item that we think we might need some heavy conservation or extensive intervention, we'll [involve the Conservator] and say "what do you think? Is this object in danger?" You need other peoples' perspectives on how to go about things" (p. 35). Fougère recognizes as well that there are tasks that she has no capacity to act upon within the scope of her job, whether it is with the Cultural Resource Management Section or in her temporary project with Culinary. "Bigger things like community development and working

with the community, that's not something that we can just go out and do ourselves. We need participation [from senior management] because of the policies and practices that Parks Canada has in place. We don't have the authority to do that" (p. 35).

While the formal web of policies and procedures and the hierarchy of authority tend to limit workers' autonomy to the tasks undertaken within their positions, they have both the scope and, at times, the need to exercise initiative to in order to advocate for new ideas, challenge norms and/or achieve personal goals. Given the size of the bureaucracy, the Conservator recalls that "the man I apprenticed with said "Parks Canada is not going to take care of you. You've got to initiate" so that's what I was sort of brought up with. I've got to initiate" (p. 5). Taking initiative is seen to be a desirable characteristic in the workplace, at least by senior management, although it is not always exercised by cautious staff. The CR Manager reflects that "we do want [staff] to take initiative and do things. Nobody's going to come down on them for a bad idea, a good idea or what they might think is a stupid idea, right? We're trying to encourage open communication, and that takes years, believe it or not. It takes years" (p. 7).

A reluctance to exercise initiative to make change is observed by the Historian who suggests that some staff are resistant to either leading change or implementing it within their established work patterns. "…people really really don't want to abandon how things have been done, to the extent that when we had the management planning discussions...their vision for the future was more of the same, more people in the street, more buildings open, more activity. We just need more, and then everything will be fine. Some comment "it was fine for so long, obviously the problem now is just an economic hiccup and once this is over, it will be fine again." I'm not inclined to agree with that. ...people feel very personally invested in their jobs ...you get some very personal feelings when change is suggested, when somebody comes with a new idea. We've certainly had lots and lots of [that]." The Historian recognizes that she takes the initiative to advocate for new approaches out of a sense that change is timely and necessary. Since she shows an inclination to lead change, she finds that senior management is encouraging: "Go on...go out there...go out on a limb....go…good luck" while other staff are just not wanting to have anything to do the changes she is advocating (p. 16). She laughs when she says she is "doomed" by her initiative and enthusiasm.

Fougère reflects on the initiative that she brings to her work. "I like to learn and if I'm doing a job or if I'm immersed in something, I like to know everything I can know about that

one thing so that I can do the best that I can – or at least try to do the best that I can. If something fascinates me, I will delve into it and will say "okay, if this is it, how does this over here affect that? What about these few things? How does that work into this?" I have a lot of energy. If I put my energy into one spot, I'll say "how many ways can I look at this project? How can I share this with people? How do I bring people in to the project? So that it's a team effort and not just me. I often find that other people also have a lot of good ideas when it comes to a specific project or an exhibit, or a some sort of a project that we're working on, to get other peoples' approaches, because I think the best results come out of a team approach, as opposed to just one perspective looking at things. I like to take initiative that way. Sometimes the best ideas are formed just by sitting and chatting with someone else. You can say "I had this idea. Here it is. What do you think?" You start with other people on that. Brian and I have done that quite a bit with the collection, and with finding suppliers, because you can't run off to Wal-Mart and pick up the cutlery. For reproductions for use on Site, you just can't do that. Sometimes you have to get creative. If...we're making a reproduction of an item, you go "okay, let's look at that." Just talking through the process sometimes helps. I like doing things like that--I think that's where my initiative comes from" (p. 8).

Others remark on Fougère's initiative and energy. "She's very confident, outgoing person anyway. She's always had brilliant ideas – always had brilliant ideas. She is a go-getter" (Conservator, p. 12). "There are a couple of things playing into [Fougère's] favour here. She's high energy, she's creative, she's witty, she has fun in her workplace. And she's generally...able to communicate what she feels is important...she moves forward, she keeps going, that's her personality. That's who you're looking for as an employee, somebody...[who] can achieve her goals, whether she's a curator, whether she's in product development, whether she's head of the culinary program" (Manager, p. 11). The Historian, who has worked with Fougère on an historic chocolate research project, observes that Fougère "...is taking care of this collection but she is also very motivated to understand the collection and very motivated to see that the collection is used in a positive way in the presentation. I would say that her immediate supervisor was pretty comfortable in letting her explore [the development of the historic chocolate presentation and product]. ...I think that [she] was always tremendously conscientious that the job itself got done as well as the things that she was interested in developing" (p. 15).

REFLECTIONS ON LEARNING FOR PROFESSIONAL PRACTICE

Organizational Approaches to Continuing Professional Education: Parks Canada has a long history of providing training to ensure that its many employees share a common understanding of its principles and policies. As noted, Fortress of Louisbourg staff have participated in orientation workshops and CRM policy workshops as well as many management, supervisory and technical workshops according both interest and availability. Curricula for these tend to be organized centrally and delivery can take place either in Ottawa, through the various regional service centres across Canada, or on Site. Courses tend to be technical in nature.[44]

Despite its extensive training support system, a Parks Canada survey of employees in 2003 revealed concerns about lack of access to training and professional development opportunities. The Parks Canada Learning Strategy was therefore developed in 2005 to "create a dynamic learning environment for individual and organization excellence in achieving our mandate" (Parks Canada, 2005, p. 1). This strategy notes that "at the centre of change and learning are engaged staff, committed and passionate not only to their work and profession, but to the organization. Engaged staff will engage our stakeholders and visitors. Engaged staff will help the organization succeed" (Parks Canada, 2005, p. 3).

The Learning Strategy offers a Learning Competency Framework that illustrates the degree to which Senior and Middle Managers, Supervisors, and Knowledge Workers are differentially expected to master knowledge and skills associated with professional and technical tasks, corporate attributes, and managerial and strategic needs. Five building blocks[45] to guide the development of a learning environment are also identified. This

---

[44] For example, the Federal Heritage Buildings Review Office (FHBRO) of Parks Canada scheduled the following 2–3 day courses in 2009/10:

- Windows Conservation for Historic Places (Lunenberg)
- Fire Risk Management in Historic Places (Ottawa)
- Conserving the Modern (Halifax)
- Introduction to Masonry Conservation for Historic Places (Kingston)
- Architectural Masonry Conservation: Repair and Maintenance (Winnipeg)
- Introduction to Heritage Obligations under the Treasury Board Policy on Management of Real Property (Ottawa)

1. [45] embrace a culture of engagement where we invest in the lifelong learning of our staff: "engagement is about strengthening the connection of an employee's heart and passion with the organization and its direction"

document has paved the way for the creation of the Leadership and Learning Team within the Human Resources Directorate in Ottawa to guide the implementation of a wide range of strategies. Among the key actions are the establishment of a training network to serve both new and existing staff; development of partnerships and instructional strategies to maximize the efficiency of training delivery; development of leadership competencies; preparation of employee learning plans that are linked to performance appraisals and career aspirations; introduction of coaching and mentoring to facilitate the transfer of knowledge from retiring employees; and the integration of learning initiatives within annual corporate and business planning. A particular priority is the development of supervisory skills across the systems since the 2003 Employee Survey highlighted "a perception that managers lack the necessary people skills to lead and motivate the workforce" (Parks Canada, 2005, p. 1).

This comprehensive strategy is being implemented and I had the opportunity to talk with Dorothy Payne who works with the Leadership and Learning Team and who happened to be on Site during my visit. As she notes in an unrecorded conversation, the emphasis to date has been on creating infrastructure and policy and on rolling out the supervisory training initiative which, among other things, will strengthen capacity for the development and management of employee learning plans (J. Davis, 2010b).

The Parks Canada Learning Strategy does note the importance of "maximizing the effectiveness" of new learning through the integration of training and job coaching (Parks Canada, 2005, p. 7), and it cites an unspecified study from the Canadian Centre for

---

2. ensure that all staff have access to learning activities to support performance: "From e-learning and classroom training to assignments, from conference attendance to job shadowing, all forms of learning will be considered to remove inequities caused by location, function or level"
3. ensure that the organization identifies and strengthens staff competence throughout the organization and offers training and learning opportunities to address those needs: "competence (skills, knowledge and talents) help an organization define the behaviours needed for individual and organizational excellence"
4. ensure that all indeterminate [continuing, permanent] staff have personal learning plans: "Learning plans, as one component of performance management, support the personal and professional development needs of the individual as well as current and future needs of Parks Canada. Plans should address the skills, knowledge and abilities needed for superior performance in the existing position, and for career development. Accountability for the development and follow-through of learning plan results is shared by the learner and the manager. Performance management is not an event, but rather a continuous, collaborative process"
5. measure, evaluate and report on our progress

Management Development that notes that "research in the US has demonstrated that training combined with coaching increases productivity by 88% versus 22% for training alone." However, it does not explicitly discuss the dynamics or challenges of learning transfer. While no mention is made of the complex role of the workplace in creating receptive conditions for the application of new knowledge and skills, the report does briefly allude to Senge's (1990) concept of the learning organization (Parks Canada, 2005, p. 1) in setting a context for the Learning Strategy.

The Learning Strategy emphasizes that to achieve a sustainable learning environment that "supports Corporate direction and business priorities," planning for learning will be undertaken annually "linked with local and business planning activities" (Parks Canada, 2005, p. 9). This promises to bridge a gap between management planning and strategic knowledge development at Fortress of Louisbourg that a number of interview participants alluded to. For example, the Curator/Collections Specialist notes that over the past few years staff hiring and professional development has not been explicitly linked with planning for new initiatives. "...that really didn't enter in to the picture very much. There has been really very little in the way, for instance, of succession planning. As far as encouraging people to go and study and learn, and/or to search out people who have theoretical [knowledge] we haven't ...As far as encouraging people to take specific learning measures to result in better presentation of this place, there has been very little emphasis on that" (p. 5). This is reinforced by the Conservator who observes that "I've never been in a situation where someone has said "well if you're going to perform this function you're going to need this education or this experience" With [training I undertook to support] the FHBRO [building assessment] project...that was again my own initiative" (p. 7).

The CR Manager suggests that the Site's approach to staff development could be more strategic. "We've not had a good history of learning. We've had a decent history of training. I'm separating the two. I'm not convinced we've been giving the appropriate training to achieve the learning that we want. ...The whole business of providing staff with the tools and training needs to be overhauled. It's got to be looked at in a totally different way. We've done some towards that, whether it's chainsaw operation or what we call Level 1 history – just training staff to understand what the history of the place is all about" (p. 8). He identifies a particular need to further develop employee understanding of the full scope of roles and responsibilities across the Site since sometimes staff "…don't know what their next door

neighbours are doing or what their responsibilities are. There's a level of learning that needs to go on just about the organization. It's all about this internal consistency. We cannot function as a family if the brothers and sisters don't know what each other is doing" (p. 8).

While the Learning Strategy is influencing change at the corporate level, interview participants were unaware of it, perhaps because it has not yet been integrated within operations planning at the local level (although I did receive my copy from the Human Resources office on Site). The CR Manager comments, "I've never even read it…I've never seen that. It's probably something that I'm hoping I'm following" (p. 10). The Curator/Collections Specialist notes that although he wasn't aware of the Learning Strategy, he "probably should be" and went on to note that it hadn't been discussed yet in the Louisbourg context (p. 12).

While these comments suggest that planning for systematic and strategic learning is not yet being undertaken across the Fortress, there is a general awareness of the potential of the annual performance planning process to highlight and coordinate employees' interests in professional development. Fougère observes that learning plans were integrated within performance plans "...in the beginning, and then they sort of stopped, and they started them again. I think it's to give you a sense of "okay, what have you've accomplished, and what are you going to accomplish? And what are your learning plans to help you accomplish those goals?" It all sort of fits together, and then when the manager gets all of those, he can look at them and say "yes, this is the direction we want CRM to go, and all these learning plans fit in with the bigger plan." Fougère goes on to say "...I like learning plans because if you have in your plan that you would like to study French, when the opportunity comes up, if you take that initiative yourself, or if there is some sort of training that the Park is offering, they could go through all the evaluation plans and say "this many people would like training in this area. Let's bring somebody in and facilitate training in that area" (p. 10). While Fougère likes the notion of learning plans, her supervisor observes that while "we're required to do that...the extent to which it gets done may be a little iffy. ...I don't think that aspect of our organization here is very strong" (Curator, p. 9).

Regular opportunities for training are also presented by Parks Canada, particularly through the Atlantic Service Centre. "Most likely what happens is if a course comes up and it's put out there, it's sent out to all of the managers. They have a look at it and say "Do you need this? Yes or no?" If it's good for you, they say "this would be good" (Fougère, p. 3). Employees

are aware that approximately $500 per employee is budgeted annually to cover either in-house or external learning activities, and that Parks Canada will cover additional amounts as required (Conservator, p. 5). Fougère indicates that she has attended many Parks Canada workshops over her twenty years at the Fortress. "I've taken online courses as well in budget and financing. They've sent me on supervisory training courses. If I need something, it's there. They don't have a problem supporting me" (p. 2).

The Curator/Collections Specialist also recognizes that the Fortress is generally supportive of a range of learning activities, although it tends to favour learning that builds understanding of the Site and its history. "The strengths around learning are that you can spend a lifetime of learning about all aspects…of history. ...I do have a concern that as far as formal learning in terms of what it is that makes a museum run, in most of my time here I can say that our managers didn't know what it is that makes a museum run. They therefore didn't see that it was important for someone else. So as far as history and curatorial things and lots of stuff like that...learning is encouraged and is praised and lauded, but as far as knowledge of how we should be doing what it is we do, [this] hasn't had much in the way of a high profile here" (p. 12).

Learning for professional practice also takes place in non-formal settings. For example, when employees go away for courses, they are often asked to then teach the content to colleagues on Site. Reading and collegial consultation around specific content areas are also regularly undertaken. As the Historian notes, "…when I started, my manager at the time gave me a lovely stack of articles with all the classics of [public history]" (Historian, p. 5). She goes on to say that working alongside experienced colleagues contributed to her knowledge of her work. "I had a colleague in Halifax who just retired last fall who I miss tremendously. He had been here for twenty- some-odd years, and was also a wonderful source, someone that I could call and discuss ideas and concerns with" (p. 5). Fougère notes that she turns to social networking sites for some ongoing learning. "Facebooking...I'm actually doing that with Culinary because there are Facebook connections on Culinary...the Ontario Culinary Association has some historians" (p. 18). The Conservator also takes an informal approach to building her skills when she contacts specialists within the Atlantic Service Centre seeking advice on specialized treatments (p. 3).

And of course, learning 'on the job' is a key way of further developing both skills and confidence. "My level of confidence and ability has gone up because of the foundation of the

knowledge that I've gained and also the experience. Going through and learning as you go gets easier for the next time you go and do something. You've learned those skill sets, so now you can go back and put those into practice for the next time... Sometimes you get a little excited and a little nervous when you're trying something or doing something for the first time, and you look for a lot of guidance in that to make sure that you're doing it right. I think that's a very intelligent move (laughter) because to go off on your own direction is never a good idea. [It's best] to look for that guidance when you go through it the first time. The second time it's a little easier. And it gets easier after that" (Fougère, p. 29). Fougère goes on to note that her growing confidence and maturity in her work enables her to participate more fully. "…I will tend to give my opinion if asked, or if there's conversation going on I will put my two cents in and tell them what I think. I might not have before. It's a fresh perspective, it's a different perspective. It might be something that somebody's not thought of yet. Or if they have, it's a new spin on it. That's why when you sit down and you talk about things as a team, the best idea comes out of the team approach" (p. 29).

Individual Approaches to Continuing Professional Education: While the Fortress works within policy and procedures that support learning and has a generally positive attitude toward employee participation, much of the onus seems to rest with the individual to initiate learning goals and educational activities after their initial orientation and job training, particularly if they want to engage in learning that is external to the Agency. Fougère's supervisor, the Curator/Collections Manager, notes that "basically if you have the interest and the initiative to gain any kind of knowledge you want ...[you can take] pretty much any kind of a course, and if that can be seen to be a benefit to the institution here it will be paid by the institution. ...occasionally there will be some time [as well], but certainly not a whole lot of time: a few days here and there...If personal initiative is not a part of that, it's very seldom [a supervisor or colleague] will go around and say "this is something you should take, this is something you should study, this is something you should learn, this would be great for you in your career." I haven't seen a lot of that" (p. 9). He also observes that the Site tends to favour learning activities that expand understanding of the Site and its history, "...but professional museum practice, no. There has been very very little emphasis placed on that. Actually no emphasis placed, other than by those who developed an interest themselves and followed that" (Curator, p. 6). He goes on to reflect that "[Fougère] should have a learning plan. She doesn't have anything that's long term. If she expressed...an interest in a particular

field...then a learning plan…could be developed from that. For the most part, I do believe that the initiative needs to come from the individual. It hasn't been coming from management down" (p. 13).

The Historian reinforces the key role of personal initiative. "I would say my learning is probably 95% [initiated] by me" (p. 12). She also observes that "...there is an expectation that professionals will keep their own learning plans moving forward. It is monitored to the degree that with every performance evaluation we're supposed to submit a learning plan…within the [Fortress of Louisbourg] Management Plan, I would say that there is not really a specific articulation of a need to develop" (p. 9-10).

Many employees come to the Fortress with strong academic credentials. "...a lot of people around here have a Masters degree in history, in archaeology, or in conservation. So yes, they have a good degree of knowledge. They are well educated people" (Fougère, p. 15). However, because there is a strong reliance on employees to initiate their own training activities, the Historian doesn't observe a great deal of involvement in continuing professional education, in part because some employees do not perceive a need. "Not so much. I think that there's a lot of satisfaction with [existing knowledge] and a compartmentalization of functions. [They say] "this is the job that I do; this is how I've done it all along. There might be things within Parks Canada that I need to learn about" but there's a very personal element to how one does one's job and that becomes a little harder to move than other things" (p. 12).

The Conservator also notes that most her learning activity is self-initiated, in part because her practice is highly specialized and evolves quickly. "In our field where it's so science-based, you need to stay current with technology and techniques – they change so quickly. At any given time you could rhyme off six courses that you could take online, or it could be just even going up to the Atlantic Service Centre and just working on a project with someone for a week" (Conservator, p. 6). She notes that she receives consistent support when she seeks training because "I feel it's my duty to go in with at least Option A, B, and C [for training]. I try to make it very hard for [my supervisor] to say no to me" (p. 4). She also observes that colleagues who do not identify and advocate for such opportunities are not participating to the same extent that she is and speculates that "maybe it comes down to personalities" (p. 4).

While all the participants emphasize the role of personal initiative in identifying and pursuing continuing professional education, they also note that once they have initiated a

learning request, it is generally easy to gain organizational support. "We sit down, we have a discussion, we look at the criteria and the course or the training involved and the training involved and what it means – how it could impact our work and what we're doing. To justify it – we have to write to the manager to say "okay this would be good [because]...," and we send out a justification to the management section and if they agree, they say "sure". I've never been turned down, so they're very supportive" (Fougère, p. 3). Fougère also notes that as she goes into coursework, she normally does so with expectations on ways it might benefit her work. "...usually I'll ask questions. For example in a course on disaster preparedness, I could say "Louisbourg is unique. We're not a contained museum. We have sets of problems with the structures and how vermin get in or how the rain comes in, because of the nature of the structure itself. We're not contained in one building. We have many buildings, many areas." I ask questions about the problems that we currently have and how we can solve those problems. I'm always thinking how what I'm learning can be applied to the workplace" (p. 3).

Fougère also notes that she consistently seeks to brief her colleagues on the content of her coursework and its potential benefits. "Whether I take a written handout back with me...or we discuss what happened, there's always a discussion on the courses that I take, whether its training through Parks Canada or whether its training through somebody else coming in, or coursework at UVic. I always went back and said "wow...this is what I learned today, or this is what I learned in this course"" (p. 3).

Participation in the Cultural Resource Management Program: When Fougère first arrived at Fortress of Louisbourg, she was pleased that her supervisor and manager encouraged her to attend a range of workshops and training sessions that helped develop specific skills for her work with collections. "They'd send me to Halifax for training on preventive maintenance and how to work with the collection, recognize damage, and so they were very interested in developing me as a person as well, right from the very beginning, I showed a lot of initiative. I showed a lot of genuine interest and care for the collection as well. I think they saw that in me right from beginning" (p. 2). Over time however, Fougère became interested in further developing her knowledge and in acquiring a formal credential that would support career advancement. "I felt I should have a better handle on the basic principles and practices of CRM and...I wanted to be on a better level than what I was before. It was something that really interested me, so I wanted to know more" (p. 18). By 'better level' she meant "professionally, for my knowledge, because I didn't really have any before. I

had always wanted to go to university and never did. Life sort of got in the way. I didn't know what I wanted to do so I worked for a year...until I came into this [position], and then it was "Wow, this is an incredible world. I really do want to know more." So that's when I went through the [introductory distance education] course through the Canadian Museums Association" (p. 18). Fougère notes that when she registered for the CMA course she did so without consulting with her supervisor or seeking support. "Because it became an interest for me I decided on my own accord to take the introductory museum studies program through the CMA...I just sort of took that on my own initiative. I did tell them when I was finished with it. It did wind up in my evaluation. They were very happy and pleased that I had taken this initiative myself to begin the process" (p. 1). While Fougère enjoyed this course, "…even then I thought "that wasn't enough, that was just sort of a taste" and I thought it was important to have some sort of paper..." (p. 18), so she began researching options for further study that didn't require that she leave Cape Breton.

Both her immediate supervisor and his supervisor suggested that the CRM Program might meet her needs. As the Curator/Collections Specialist had completed the CRM Program's *Introduction to Museum Studies* course ten years earlier, he notes that "I recommended it to her ...because she was anxious to do something that would enhance her career to begin with and to follow up on many of the interests that she has had in working with the collection for over a period of years. I had taken a course at UVic, found it very useful and beneficial in my own work, and recommended to her that it might be something she would want to think about. She looked into it and followed up on it. She has done a great deal more than I ever have. I used what influence I could to see that her tuition was paid by the Fortress, even to the extent of mentioning it annually in performance evaluation appraisals, and making a point in performance appraisals to attribute at least some of [Fougère's] contributions to the Site to the fact that she was studying and learning and therefore able to work at an increased level" (p. 14).

The head of the CRM unit at the time also drew the Program to Fougère's attention. Fougère notes that "[the Curator/Collections Specialist had taken the course, and [the CRM Manager] was saying to him "well, do you want to take some more?" and he said "no, no, no, I'm at the end of my career" and I said "I'll take those!" ...I had been quietly looking off to the side, but I hadn't found anything, so he said "they are offering this through distance, do you want to take it?" I said "absolutely" (p. 18). A large part of the initial appeal of the Program

was its accessibility and convenience. "I really liked the idea of not having to venture out on the roads in the evenings to go to...the local University. It's a forty-five minute drive. So I liked the fact that I didn't have to negotiate the roads. I liked the fact that I could sit and think and write at 8 o'clock at night. I found it really convenient to do it at my own leisure. I really enjoyed online coursework because I could sit by myself and write. I could...start something and then come back to it if I'm not thinking clearly. Those are all things that I enjoyed. There wasn't too much that I didn't like" (pp. 16-17).

Fougère also notes that participating in the distance format rather than the on-campus intensive courses was more affordable. "Cost was an issue for me personally. I thought that Parks Canada, in paying for the courses alone, was giving me a lot of support. That was incredible support and I didn't feel that I should really ask for more by saying "can you send me out [to Victoria] and put me up for a week for an immersion course?" I thought that was something that I would have to do on my own" (p. 19).

While the choice of elective courses in the distance format is more limited than those available on campus, Fougère found that "I thought the [elective] courses that I took would help me with my job skills here at work and had a connection to what we were doing. When *Public Programming* came up, I thought "that's a really good one, I want to understand that process since we do have interpreters, we are a living history museum" so I thought I'd like to learn more about that. The *Conserving Historic Structures*, absolutely. *Managing Cultural Organizations*, I thought "oh yes, I should have a management one in there somewhere to understand the processes around that." So yes, I was able to relate to all of the electives that I took. If I had found that none of them related, then I would have had to wait and see what came up the next year. They were there for me, they got me through it, they were all very important electives" (Fougère, p. 21-22). She also notes "I thought that the courses were very well laid out. I thought the issues and the assignments in them were very well thought-out as well. They related to the concerns and what people would want to know to continue a career in the museum field. So the principles and practices in each course...were very well put together" (p. 22).

One of the consistent instructional strategies in CRM courses is to relate assignments to practical issues and circumstances in the workplace. Fougère found this helpful both from a convenience perspective and because it reinforced concepts. "[The Fortress] was my base for all my learning. I used it for all my courses. We seemed to have it all: we have the relationship

with the community, we have historic structures.... It was my living learning laboratory for my *Public Programming* course, for all of them. I didn't need to go anywhere else...I thought that everything related to what I was doing" (p. 21).

She is particularly appreciative of the personal support that the Park Superintendent at the time provided to her. "She supported me in the CRM program in any way that she could. She took genuine interest in what I was doing. She asked me how my courses were going, what I was working on. She gave me support in any documentation that I needed. She'd say "here, look at this or here, look at that." I went to...a Tourism Industry Association of Nova Scotia summit in Halifax in 2007 to promote the 2008 Celebrations here and while we were there we went to different conferences. There were people giving some discussion panels. There was one that she went to and she came back and said "...here, I took some notes for you." And I thought how supportive is that? So having support like that had a big impact on the fact that I was successful with the Program and every time I passed a course, I would get reimbursed for that...which is another huge form of support. I would have done it on my own, but she knew what I was doing and she said "You pass these courses and I'll pay for them" so that was huge" (Fougère, p. 13). In addition to receiving moral and financial support, Fougère was able to undertake some coursework during working hours. "...if I had an assignment coming up or if I was working on a project for the course, they did let me take time out of my day, because they knew it would come back to the workplace. What I learned would come back to the workplace. The *Conserving Historic Structures* course, I used my office as my study structure, to take outside photos. That again has come back to help. It was an investment...in me" (p. 13).

Fougère also involved her colleagues as consultants and supporters in her learning process. "...as I was going through the coursework, I'd come in to work the next day and if I'd read an interesting post, I'd say "well, guess what happened last night on the course?" It's almost like a soap opera. I'd come in the next day and say "oh, this is what we discussed last night, what do you think of that?" It was as if my poor [supervisor] went through the courses with me...If I was having a problem trying to understand something, I'd say "what do you think?" He took one of the basic courses at UVic as well. He took the [*Introduction to Museum Studies*] one. So we had this connection in that regard as well. We had some really good dialogue around that. Those are things that I found really, really, really, really interesting and fun" (pp. 16-17). She would also seek input from the Conservator, particularly in coursework

associated with collections. "I talked about it so much that the Conservator...just took the course...she just finished it in December. These are resonating impacts that just keep going on" (p. 14).

In addition to drawing on colleagues' input, Fougère notes that she enjoyed the opportunity to build external collegial networks. "I found that meeting the rest of the students online and talking to them and having online dialogue [was] very pleasurable. To talk to other people who were in the same world, doing the same things, facing the same problems as we were facing [was wonderful]" (p. 16). She notes that "I've met a lot of interesting people. I still stay in contact with some of them, or I hear about them in the news, which is great. I know that if I need to go out there for advice, I can ask people from Halifax, I can ask people from the States that I've met and have remained friends [with]. ...and sometimes I turn to the Internet. I have one woman on Facebook with me...we're still friends. I still get [email] newsletters from doing coursework where we were asked to join a [listserv]" (p. 4-5).

The only concern that Fougère expressed about her involvement in the Program was an occasional difficulty in acquiring feedback from instructors. "Sometimes trying to have conversations with the instructors, back and forth, was a little challenging. Or trying to understand why [a mark was assigned]...I'm the type of person who needs to know 'why'. If I made an 85, [I think] "okay, where did I lose that 15 points? Tell me why I lost that. I want to hear why, if you're taking these points from me, tell me why." Dialogue like that. It would have been a little nicer to have more dialogue. Some of the instructors were not as friendly as others, but they were still very good instructors. I have to give them credit for that. It's little things. It was nothing major that I disliked. I really liked the courses. I liked the Program. I enjoyed myself very much" (pp. 16-17).

Fougère is enthusiastic about the degree to which all her coursework shifted her perceptions of her work in cultural resource management. "All [the courses] had an impact on how you look at how things work. And so you're always examining the situation that you find yourself in, or the project in front of you. ...yes, it's a transformational change. And you may not realize it right away" (p. 20). She notes that she found studies that focus on community engagement particularly transformative. "Yes, I did, especially with community, especially with community. I looked at that in a whole new light, and I thought "ohhhhh, I can even engage a community." I thought all of that was fascinating" (Fougère, p. 19). She went on to

say "...that really had changed me. That one course was amazing...*Building Community Relations*" (p. 19).

Fougère also offers another example of what, for her, was a transformative learning experience. "*Conserving Historic Structures* makes you look at things in a whole new way when you're looking at a building. ...the north end of Sydney, or St. George's Church, or St. Pat's Church – or the organizations that run them. ...You're thinking about the volunteers that work for those organizations...and what it means to the community, and what it means to the museum. [Course concepts] creep into everyday life...little things. Don't [they] though? ...They seem to be always there in the back of your mind, and you find yourself thinking about them. And [you think] "wait a minute, I know where this is coming from." As far as transformational, some things are more glaring than others, but you realize that it's there" (p. 21).

Overall, Fougère indicates that her participation in the CRM Program has significantly shifted her approach to her work at the Fortress of Louisbourg. "I felt I should have a better handle on the basic principles and practices of CRM, and I was right. It has given me lots of foundation, so I wasn't wrong in that" (p. 18). She also notes "It has given me a foundation knowledge that helps me with my decision-making, with my thought process, with my conversations as far as current issues" (p. 14).

Her colleagues also observe changes that are seen to result from her participation. "She sort of blossomed...it gave her confidence in what she was saying. Like "that is a good idea, and now I know why it's a good idea." In that respect, that's probably the primary impact" (Conservator, p. 12). The Historian also perceived a growth in confidence although she isn't doesn't attribute it just to her studies."I'm not really sure, because she is so motivated that if she sees a need, she starts to try to address it. If she sees a possibility, she goes towards it. I do know that my manager at the time was encouraging her to take the [Program] because he felt that she did have a capacity and that directed, she could really develop this capacity. ...[he] was fairly involved in [Fougère's] career because he perceived that she had the capacity to do way more than simply take physical care of collections" (p. 15).

Fougère is pleased that she has completed the CRM Program, but recognizes that she has an interest in further studies to support career advancement. "I'd like to continue my education. I'd like to [study] in the museum field, the tourism field, the cultural field. I'd like

to learn a little more French. If anything, I think the bi-lingual thing might be an inhibitor down the road. ...it's a requirement in the Government, but if I don't have the qualification in dual languages then I won't apply" (Fougère, p. 4). She also notes "[Continued learning] is a personal goal for me and I think it's important to learn as you work. I think that's how you grow in your job. And I think that's how you grow as a person...I'd like to know more about new and innovative processes in how collections are being cared for because technology changes, things change, and I think it's important to stay connected so that you can change with it" (p. 17).

SUMMARY OF CHARACTERISTICS THAT INFLUENCE LEARNING TRANSFER

As a large and multi-faceted Site, working within the larger and complex Parks Canada Agency, the Fortress of Louisbourg has a number of key organizational characteristics that impact its capacity to support continuing professional development and the transfer of learning in both positive and negative ways. These include:

- **strong staff enthusiasm for and commitment to their work in cultural resource management at the Fortress**
- **comprehensive Parks Canada policies, protocols, guidelines and training activities that prescribe how museum workers in the Cultural Resource Management Section of the Fortress approach their practice. These tend to emphasize procedural knowledge.**
- **Agency-wide internal networks and systems that define and support professionalism; these contribute to a lack of extensive staff engagement in external professional activities and networks within the museum sector**
- **a hierarchy, chain of command and team-based approach to decision-making that tends to encourage limited autonomy within defined work positions**
- **systematic management and operational planning that sets out goals and objective for the Fortress and provides a foundation for work planning within each specialized Section; this approach to planning however does not tend to explicitly address the knowledge and skills needed to undertake that work.**
- **pressure for Agency-wide change to strengthen visitor experience, thereby stabilizing public support, attendance and associated revenues**
- **Agency-wide human resource management and professional development policies and training activities that provide a framework for corporate and individual approaches to continuing professional education**

- **A commitment by a new senior management team at the Fortress to strengthen organizational culture and morale across the Fortress, including more consistent approaches to communications and performance planning**
- **strong expectations from local communities to sustain and further develop local tourism activity**

REFLECTIONS ON LEARNING TRANSFER

While interview participants observe a range of ways in which learning could be better supported at the Fortress, they don't tend to perceive a gap between the investment that is being made in learning and the ways in which learning benefits their work and the Site. "If they've given you the training, it's because they want you to use the training. If you've got their support, then they expect the follow-through" (Conservator, p. 14). There is a general sense that when learning is undertaken it is applied on an as-needed basis and there is little evaluation or follow-up to determine specific outcomes or benefits from the training investment. Interview participants expressed surprise when told that the literature of learning transfer indicates that the workplace application of knowledge and skills gained in continuing professional education classrooms tends to be limited to 10-30%. The Conservator, for example, said "I'm startled by that figure and am sitting here wondering if that is [specific to] private industry" (p. 14) since she hadn't personally observed problems in applying new learning. Fougère also comments "Wow! I'm sort of blown away at that figure. I thought it would be much higher than that, much, much higher than that." She went on to say "I wonder if they went back and asked those people again to truly sit down and think about what they've learned and what they're applying, if they would get a different answer now? Because even though they may say "well, that doesn't apply," it may not apply now, but it may apply somewhere down the road. And they're not thinking about it yet, or it just comes naturally out of them and they don't understand or realize that it's because of their [learning]. I wonder how many? ...even though I just graduated in November, it has been quite a while for me. I'm wondering if you had asked me that question right away, I probably would have said "yes, I'm doing some things", but asking further down the road, you start to understand how it creeps in every day..." (Fougère, pp. 23-24).

Fougère makes a number of observations about the role of timeliness in her application of the knowledge and skills gained in the Cultural Resource Management Program.

"I find that if...you get into training or courses, you come back and one way or another it gets applied. It may not get applied right away, but at some point in time, you use skills in the workplace that I think help shape the overall workplace for the better" (p. 11). Her supervisor observes that collections-related knowledge which is largely procedural tends to be applied in a fairly straightforward manner. "...in terms of my line of work in the collections management or curatorial fields...lessons are learned and are put into place to the extent possible. People become enthused about that. It's fairly concrete stuff that you can work toward and actually do and see an [immediate result]" (Curator, p. 11).

Over the course of our discussions the notion of timeliness in applying learning was discussed in a number of contexts. For example, Fougère notes that technical practices that are aligned with Parks Canada expectations, and often gained from Parks Canada training, tend to be easily applied. "...with the way we store things, with the way we monitor the collection, how we [see that] all the tags need to be changed. We go through a process and change tags, rearrange storage rooms, move things away from a wall or...to another room. Any training that we get like that, we put into practice" (p. 22). In general new collections handling and management practices learned through the Cultural Resource Management Program were also straightforward to apply. "[Often] there were something that we could apply right away, so when I was working in a course, or when I'd finished, I'd come back and say "we could be doing this, or we could be doing that, or what do you think of...?" so there was always discussion there" (p. 23). She notes that her capacity to apply new learning "depends on which job I'm in. It's easier to put knowledge to work with regards to storage requirements and the way you handle artefacts, storage...If it relates to the job that I'm doing, then I can apply those principles and practices at that point in time" (p. 35). She also notes that there were times when logistics slowed the application of new practices in the Collections area. "...you couldn't always apply it right away...Maybe sometimes I'd be saying "oh we need to do...," and the response would be "yes, we can do that if we do these three things first..." or "we can't do that this year because we don't have the money, but as soon as the new year comes, we'll look at that"" (p. 23).

Fougère also notes that her course assignments enabled her to develop new knowledge that was of direct benefit to her working area. In the *Conserving Historic Structures* course for example, she prepared a Statement of Significance and a Historic Structure Report on the building in which she was working, following general guidelines provided in the course

materials. In addition to raising her awareness of both building construction techniques and of issues that impact structural condition, her report was later utilized by a restoration architect who was brought in to prepare similar documents. "She said that the report was very good and I had done the foundation work for her. While I was doing [the report], the person in charge of Engineering came over, and we got up into the attic and looked around, and I took photographs. So when [the architect] came, we were talking about...where the water was infiltrating because I had started to record how water was coming in. I had started a lot of foundation work for her. We had a wonderful conversation about that; that made me feel really happy. It helped her a lot, to the point where my report got appended to hers" (p. 14).

This experience also increased her appreciation of the ways in which the building impacts the collection. "I'm going "okay, I know water is coming in from here, so we need to do these few things to mitigate what goes on." It makes me look at how we store the whole collection. It makes me look at heritage buildings in general; it makes me stop and think "okay, what is the value in this building? Where does the value lie? Is it in the architecture? Is it who owned the house?" I've always got these things in the back of my head" (Fougère, p. 14).

While Fougère cited a range of instances in which collections-related learning could be applied in a fairly straightforward and timely manner, she notes that concepts that related to museum activities outside the scope of her Collections position have taken longer to put to work. Ideas that interested her relating to community engagement, public programming, and management raised her awareness of activities in such areas across the Site and prompted her to become involved as opportunities presented themselves over time. Her enthusiasm and capacity for an expanded role have significantly shifted her work at the Site.

An early opportunity to work on a project that was slightly outside the scope of her job came when she was asked to collaborate with the Historian on research relating to heritage chocolate. As her interest and expertise in this area grew, Fougère participated in a conference, co-authored an academic paper (Lane Jonah et al., 2009), and developed a relationship with the Mars family (of Mars Bar fame) to produce heritage chocolate products for sale at the Fortress. While she began her involvement in culinary matters with a focus on the material culture of chocolate, she made a transition to viewing chocolate and other culinary topics as an appealing and relevant part of the visitor experience. In doing so, she drew on her coursework in *Public Programming* to offer suggestions on the development of

new presentations that provide visitors with information on culinary practices in the early 18th Century. As her supervisor notes, "[She] is a very very enthusiastic individual and portions of the public programming course she took at the University of Victoria, I think she found quite inspiring" (Curator, p. 10). The CR Manager also observes that she ventured into this new area at a time when senior management was encouraging innovation. "[Staff are] being told they can do new things and different things...she's picked that up much quicker than others" (p. 11). Her energy and enthusiasm for this project resulted in her special assignment, which, among others things, enabled her to travel to France to coordinate culinary events including a banquet to celebrate the visit of a tall ship from Louisbourg. The work that Fougère and her colleagues have done on historic chocolate and culinary visitor experiences are included in the current draft Management Plan as "notable successes" (Parks Canada, 2010, p. 16). The Conservator comment that Fougère's background in collections is an asset in her work with culinary presentation (p. 14).

While the opportunity to work on the historic chocolate and culinary projects enabled Fougère to put new learning into practice and provided her with a wealth of new experience, it also generated some controversy among colleagues who wondered why she was taking on tasks outside her collections position (Curator, p. 10; Historian, p. 15). Part of this dynamic is that Fougère was acting on concepts of public programming learned through her studies that are not seen to be fully integrated at the Site at this point, despite the increasing profile of visitor experience. The Conservator comments that "no one [else] thought of it. [Fougère] sussed out all the contacts...she was the head cheerleader and carried the baton forward all the time. I know at times she said it was like rolling a ball up a hill, like pulling teeth, it was just dreadful at times, but she kept going" (p. 13). The Curator/Collections Specialist observes that "she could see where there were vacancies, gaps, things that could be filled in there, based on her increased understanding of public programming" (p. 14), and also notes, "...there hasn't been much in the way of positive regard for new knowledge [in the programming area]. We're still quoting Freeman Tilden[46]. And I haven't seen much in the way of any attempt to acquire new skills... They do have a number of programs that have been initiated from Ottawa that are attempting to do this sort of thing. ...I think that the folks on high in the relatively new Directorate in Parks that has to do with Visitor Experience...have

[46] Freeman Tilden wrote the seminal book *Interpreting Our Heritage* in 1957.

been reading all the stuff and are up on the latest thing. There's not much in the way of regard in this Site for the material as it has come down to the sites. ...I have the impression that much of what's being done [is] not being presented as well as it could be... Some of the things we're doing ...will probably fit right into that. We're having these visioning exercises and I expect those are probably stuff that's fairly close to the cutting edge as far as developing [visitor experience] is concerned. (p. 11).

While Fougère is aware that some colleagues may feel left out of new initiatives, she is confident that her efforts will be integrated within the evolving Visitor Experience unit over time (personal conversation, January 13, 2010).

The opportunity to temporarily step out of her role in Cultural Resources also presented a chance to finally advance her interests in building community engagement since the Fortress was expressing interest in strengthening relations with the community. While Fougère had developed an interest in this area during her coursework, she had not advanced her interests at the time. "I knew that [the Site] wasn't ready for that. I knew that that we weren't there yet. So I had learned about it and thought "okay" and just sort of put it to the back of my mind, because there were other areas to concentrate on... And then you use [the ideas] when the opportunity arises. So I never found it frustrating. (p. 20). She went on to say "sometimes it takes a longer time for us to come around to a new way of thinking. Sometimes, because of the size of our organization, we can't always put our ideas to work right away. Sometimes you have to wait for the rest of the organization, for it to come from this level [indicates a high level] and filter down, and say "yes, I know something about that" (p. 20).

Fougère comments that her temporary assignment with the Culinary Project has provided her with a chance to initiate the development of a Louisbourg-based version of UVic's *Building Community Relations* course. "With this position that I'm in now...I can take the concepts used in the community partnership course...and apply those principles and practices. In meetings, in formulating the types of activities that we're going to do in looking at vision, where Parks Canada is going, and relate those concepts together and come up with concepts like the [proposed] course" (p. 35). She goes on to note "I thought this would be a good idea. ...I knew that Parks Canada was heading in that direction. I had discussed it with my manager, and he was talking about how Parks Canada really wants to get involved with the community, so I started scratching my head, thinking "okay." So you put two and two

together because you have your own thought over here and management wants to go with that. So you say "okay, this might be a good idea." The concept is there. So then you start looking at that and go "alright, I need to take these concepts and see where I can go with those." I had the confidence to go to [the Superintendent] and say "this is what I'm thinking, I learned this in my community studies course at UVic" and I can point to the binder and say "this is what I've learned" and use those case studies that were in there to say "this worked in other areas and in other cities and urban [settings]" so you can talk with a little bit of context and background from other perspectives of what happened in other communities. Reading the materials and going through all the exercises in that particular course helped me…" (p. 36).

In addition to strengthening Fougère's understanding of the concepts underlying socially engaged practice and building her confidence to initiate a project, the *Building Community Relations* course offered a series of steps that she followed once she was assigned responsibility to coordinate the proposed course in the community. "I looked at the building blocks for a sustainable community and how you need to first of all have a champion. So I said "okay, we have a champion downtown, the Louisbourg Economic Development Society." Step 2 is to have your committee, to get that buzz going downtown, then creativity, then brainstorming, then infrastructure money, then accountability. You go through those steps and say "here's where we are; here's the next step." Those are the things that I've learned in that course...how to approach them. I haven't come across anything yet that I didn't learn in the course, that I thought 'wow, this was something that I've been blind-sided with that I did not know'" (p. 37).

Fougère's growing involvement in work activities that are aligned with strategic priorities in the Fortress has resulted in an invitation to participate on the planning team that is developing the 2010 Management Plan for the Site. As the Curator/Collections Specialist notes "she has a great deal now more in the way of opportunity, partly because of her own enthusiasm and her work ethic, but in very large measure as well as a result of formal training" (p. 15). Her inclusion in the planning team challenges her to develop her understanding of a range of Site management issues. "This is where the course on *Managing Cultural Organizations* comes in to play for me. Particularly because going through that course and looking at the assets that we have and going through the processes of trying to...come up with objectives and targets. It gave me a better understanding of what the management

process was all about... When we were going through and trying to flesh out the main strategies and looking at the objectives and the targets and the actions, it just gave me personally a better understanding of what we were doing – as opposed to not understanding what we were doing. I'm not sure I would have had that full understanding of what objectives and targets and actions meant. I had a better opportunity to engage in the process" (Fougère, p. 27). Fougère notes that the planning process is spearheaded by a planner from the Atlantic Service Centre, following Parks Canada protocols for both planning and for community consultation, thereby limiting her scope in building community engagement skills. "If I was at a small museum and if I was the curator and had a skill set and had to approach the community, I could try and facilitate some community consultations and/or try and see if I could hire somebody to help facilitate, somebody with that facilitation background. Because having an understanding of something, and participating doesn't necessarily make you an expert in facilitation. I'm not an expert in facilitation, but I can participate as part of the larger group in engaging the community for consultation process. ...I feel very comfortable with [that]. As far as facilitating something with the local community on my own, that's not something I do. That's not something that any of us do here. That's something that is done in conjunction with our planner, with the approval of the Superintendent. There are steps in that process" (p. 27-28).

While Fougère notes that it has taken time, patience and opportunity to eventually apply many aspects of what she has learned through the CRM Program, she also observes that some of the content is not relevant to the particular needs of the Fortress. She comments that at times, course content seemed "to be geared more toward smaller museums and we're a much larger organization. ...Louisbourg is [a] very complex organization and sometimes...you read about some museum and say "that's a good concept, but that wouldn't really apply here because we're so big and complex and I couldn't see that working." ...[In a small museum] you have more freedom to make your own decisions that shape that museum, as opposed to where you're part of a bigger system. You've got level of government that has policies and practices that feed into what you're doing here at the ground level. It's not as easy to incorporate some [new practices]" (p. 11). She goes on to note that "sometimes that's frustrating. Sometimes it takes a little longer to get to the end result. Or we can't get to that result here, but we can get over here somewhere, on a parallel level" (p. 11). "In many courses you'd look at the readings, and some were bang on and [others] you'd look at and say "okay, I

can't apply that, but hey if I take that idea and put it over here, then I can apply that principle"" (p. 15).

The need to adapt her learning to the situated needs of the Site is stated repeatedly. Fougère notes the value of case studies in her coursework that reinforced the utility of concepts and enabled her to identify similar but not identical opportunities for application at the Fortress. "When I look at the collection or when I look at how we immerse ourselves in the community, I can go back and say "okay, these are the case studies that I studied in coursework, this is how they did it." So you can say "okay, these are the things that they've done to make this work... How does that compare with what we're trying to do here, and how can we apply some of those principles?" So it's taking the knowledge that you've learned and trying to figure out how you can use it to fit your own set of circumstances" (Fougère, p. 16).

She also notes that many idealistic standards set out in the literature do not take into consideration the realities of conditions at the Fortress – or in other museums. "...Sometimes conservation [articles] will say "you must keep your temperature at this, and your RH at that, and you must have [collections] in a clean building..." That's not practical for smaller museums. ...the more you talk to people out there, the more you realize that the policies and practices for that are...just unrealistic for a museum where you don't have the ideal conditions. ...[Our work involves] a lot of mitigating and trying to figure out ways of doing things creatively...because the reality is most museums don't deal with pristine and ideal conditions. They just don't. That exists in a world over there somewhere. That's discouraging when you read things like that, because [you think] "how am I going to do that? That doesn't work for me. That's out in left field somewhere. I've got this problem and it's very real." They talk about humidity, and I've got a bucket here that the rain is pouring into. I've had a chance to talk to other museums about that, where one woman said "we just open up both doors, let it go in one side, and out the other" (Fougère, pp. 14-15).

Whether knowledge is applied immediately or over the longer term, and whether it is applied without significant change or adapted to meet the particular needs and circumstance of the Site, one of the consistent themes that emerges from interviews is the importance of personal initiative in effecting transfer. The Historian, for example, describes an instance in which she completed a label writing course through Parks Canada. She notes that while she gained and used valuable skills for preparing label copy, it was up to her to put her new skills to work. "If I had chosen to just keep doing what I was doing, there wouldn't have been

[consequences]. ...I would say that we really have to have the conviction and the drive to push...as an individual" (p. 12).

While Fougère benefitted from the opportunity to talk with her supervisor about what she was learning (p. 22), she also emphasizes that "having the comfort of knowledge...really lets me have input into what's going on here at work. I feel more confident in giving my two cents when somebody asks a questions or my opinion on something. I can say "okay, this is relevant" and I can pluck it out of my brain and go "yes, la la la" and talk about it. Or I'll remember a particular article that I've read that has relevance on what the outcome will be, and I can say "oh yes, I've read a case study, and this is what they did, and this was the outcome, this might have an impact on where we're trying to go" (Fougère, p. 34). While her input depends on the context in which she is working, she notes that "it happens a fair amount. More than I thought [it would]" (p. 34).

Having ongoing access to the course materials that were provided throughout the Program is noted as a useful means of revisiting concepts and practices as needed. "I refer to them a lot – a lot more than I thought I would. I had them at home for the first while, and then I thought "no, this is my work stuff. I should have this at work. I took them all in and whenever I'd need something, I'd go in and refer to them and think "Oh yeah..." (Fougère, p. 24). Occasionally she shares them with colleagues, "I talk to them about [the content], and I say "oh, you know what, here's an interesting piece of literature, you should read this… Sometimes it's good as a refresher for me as well to flip back through and look at what we did in the course and the situations that we looked at, to say "...what are we trying to do that has been successful for these people over here?" and try and look at those principles and practices" (Fougère, p. 24).

Fougère notes that in some cases, having an opportunity to apply concepts long after studying them brings a new level of understanding when she revisits course materials. "There were all kinds of things…that I didn't know before [that would have helped] to understand what was trying to be conveyed in that course, and what you should get out of it as a participant, ...what you should learn. Reading through those [now] and then saying "okay, they make sense" and going back through the course and saying "I understand these concepts now." That has been really helpful" (p. 36).

Overall, Fougère perceives few problems or obstacles in her efforts to apply learning that is relevant to her work at the Fortress. "Sometimes I find that some people are afraid of

change, and if they're afraid of change, it's because they don't understand or don't know yet. That comes back to time. But other than that, no, I don't really find a problem" (p. 23). She reflects that her learning in the CRM program has been instrumental in providing a framework that helps her contextualize her knowledge and skills. "...those courses really did give me a foundation and it gives [me] credibility. So that when somebody says "well you don't know what you're talking about" you can say "yes I do." "Yes I do, I do know this and here, look..." and you put a big binder on the table. I find that you can give a better answer and you can have better dialogue. You can talk to people in a more meaningful way, not just "oh I think, I think, I think" You can say, "I know, I know." That's comforting to know that. (p. 15)

This is also observed by her supervisor, who comments "I found [her studies] very useful from my point of view, my perspective, because she knew where people were coming from when we said that this is what we're going to do. This is the objective, this is the approach we are going to take. She didn't need explanations any more about why we want to do it this way or this should be the end result. When [her coursework] applied to collections management issues, that was all of use to me and the work that we were trying to achieve" (Curator, p. 14). Colleagues also observe that CRM coursework that they have completed has been of value in broadening and contextualizing their knowledge. The Conservator, who has just completed *Principles and Practices in Heritage Conservation*, notes that she found the course "extremely useful, if only just to know the policies, procedures, to know the organizations, where to draw support. The Site may be a little difficult and at least I know now where to go to support..." (p. 5). She goes to say "it explained my gut feelings. I'm now able to sit with [my supervisor] and sort of say "it's just not my gut anymore." I can point to agencies, to papers, to policy and say "this is why it's important, and I'm not the only one who thinks so. It's completely justifiable" (p. 11).

The Curator/Collections Specialist completed *Introduction to Museum Studies* in a distance format through the Cultural Resource Management Program in 1992 and also comments that it was very helpful to him in providing a context for his work. He describes a conversation he had with a conservator from the Atlantic Service Centre in which he drew on principles of preventive conservation that he gained through the course. "[The conservator] wanted to know from the curatorial end of things what he should do. Whether he should proceed with further intervention or if he should stop where he was, and what did we think would be the best way to go? What was the intended function of the piece? Was it going on

display or storage? Was it going to be used? Was it going to be examined closely? So I sort of launched into some of the considerations that one learns about in the course that you wrote. Anyway, he agreed and went on to talk about the work, and then stopped in the middle of the conversation and said "I only have one question – where did you learn to talk like this?" And so I learned to talk like this from the University of Victoria distance learning program" (p. 2).

The Curator/Collections Specialist goes on to emphasize that studies that provide a theoretical foundation are crucial, not just in curatorial work at the Fortress but in all other aspects of professional museum practice. "I think it's absolutely crucial...to have some theoretical background, theoretical understanding, principles and the ideas that go with it... We have people here...who have twenty and thirty years experience, and they often point to that as their qualifications for being considered as really good at what they do... And that's just not always the case, because you can have all of the experience you want, and if you don't have at least some of the theoretical understanding of the principles and theories involved, the experience alone is not going to take you where you should be going. A combination is a good thing – I'm not saying experience is bad, but without some theory and understanding, I think it's not as strong" (p. 2). This is echoed by Fougère, who also notes the challenges of applying theory in practice. "Theory is good, I like theory. Sometimes you can't always put theory into practice because of timing and things that I've said earlier, or because of policy that [states] you can't do it that way. You have to go an around-about way, or look at how theory from the course and the theory of Parks Canada policies co-exist. It depends" (p. 34).

Despite the challenges of fitting theory to practice, having such a framework has strengthened Fougère's confidence in working more broadly across the cultural resource management field. The CR Manager observes that in Fougère's long-standing collections role, "she's not being asked to be creative...she could have stayed in that job...forever and ever, amen. However, because of her personality and her desire to move on and do creative things, she enrolled in the CRM Program. ...She wanted to learn more. She chose to go to the Program that you offer and when she came back from there that was like throwing fuel on the fire. It gave her new ideas...when she finished the Program she was floating. She had all this stuff she wanted to try and go forward with. That's a very positive thing. That's what you like to see all your employees do, but it's not possible for all employees. They don't have the basic

kind of drive to do that. So it's not everybody that can come back from the training program and apply it and be successful" (p. 12).

REFERENCES FOR FORTRESS OF LOUISBOURG THICK DESCRIPTION

CMA. (2009a). Canadian museums association website. Retrieved Feburary 17, 2010, from http://www.museums.ca/en/

CMA. (2009b). Museum definition. Retrieved October 12, 2009, from http://www.museums.ca/en/info_resources/reports_guidelines/museum_definition/index.php

Davis. (2010a). Degree of personal autonomy and initiative in approaches to work, learning and transfer: Fougere. In Fortress of Louisbourg Case Study (Ed.).

Davis, J. (2010b). Fortress of louisbourg field notes (pp. 5).

Fry, B. W. (2004). Designing the past at fortress of louisbourg. In J. H. Jameson (Ed.), *The reconstructed past: Reconstructions in the public interpretation of archaeology and history* (pp. 199-214): Rowman Altamira.

Info Source. (2009). Parks canada agency: Organization. Retrieved February 16, 2010, from http://www.infosource.gc.ca/inst/cap/fed04-eng.asp

Lane Jonah, A. M., Fougère, R., & Moses, H. (2009). A necessary luxury: Chocolate in louisbourg and new france. In L. E. Grivetti & H.-Y. Shapiro (Eds.), *Chocolate* (pp. 329-343): John Wiley & Sons, Inc.

LeMoine, G. (2010). Fortress of louisbourg visitation numbers. Retrieved February 16, 2010, from http://www.krausehouse.ca/Krause/LemoineGermaine-FOLVisitationNumbers.htm

Louisbourg. (nd). Louisbourg, cape breton. 2010, from http://louisbourg.com/

MacLean, T. D. (1995). *Louisbourg heritage: From ruins to reconstruction*. Sydney, NS: Cape Breton University Press.

McLean, T. D. (1995). *Louisbourg heritage: From ruins to reconstruction*. Sydney, NS: Cape Breton University Press.

National Post. (2010). Public servants face depression "crisis". *Macleans.ca*.

Parks Canada. (2001). *Fortress of louisbourg national historic site management plan*. Louisbourg, NS: Fortress of Louisbourg.

Parks Canada. (2005). ***Parks canada learning strategy*****. Ottawa: Parks Canada.**

Parks Canada. (2008). ***Parks canada agency corporate plan 2008/09 - 2012/13*****. Ottawa: Parks Canada Agency.**

Parks Canada. (2009a). Atlantic service centre website. Retrieved Feburary 17, 2010, from www.chin.ca

Parks Canada. (2009b). Fortress of louisbourg national historic site of canada website. Retrieved January 12, 2010

Parks Canada. (2009c). Guiding principles and operating policies. In Parks Canada (Ed.).

Parks Canada. (2010). ***Fortress of louisbourg national historic site management plan: Rolling draft (for discussion)*****. Louisbourg, NS: Fortress of Louisbourg.**

Senge, P. (1990). ***The fifth discipline: The art and practice of the learning organization*****. New York: Doubleday.**