



## How Formal and Informal Training Are Connected and Blended

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### Introduction

The Uni-Select warehouse, located in Edmonton, Alberta is the site of the workplace program for this research project. Uni-Select Inc., a leading distributor of auto parts in North America headquartered in Montreal, is Canada's second largest distributor of automotive replacement parts, equipment, tools and accessories. The Canadian Uni-Select Network consists of approximately 500 independent Canadian business owners under the Auto Parts Plus and Auto Plus banners. The Edmonton site with 100 employees is one of 14 distribution centers in Canada.

Typical of many workplace initiatives, an external event, in this case the proposed implementation of a new warehouse management system (WMS), triggered the need for employee training. The Edmonton warehouse was the second location in Canada selected to go through the changeover to the new technology. The new WMS procedure uses a bar code scanner or a 'gun' with radio frequency technology to find and pick products which are then sent out to customers or jobbers.

Uni-Select offered an Essential Skills training program with a focus on reading, basic mathematics and computer skills to several company employees. All employees wrote a company designed diagnostic reading and math test to assess their literacy needs. Results indicated that certain employees would benefit from upgrading their skills before using the scanner system. Uni-Select contacted the Alberta Workforce Essential Skills Society (AWES) for support and they in turn connected me with company management. After a needs assessment, I concluded that the best instructional format was one-to-one tutoring. There were two reasons for this: confidentiality was of utmost importance because the program was not made public to warehouse staff; and learners' confidence levels demanded that instruction be done on an individual basis.

Seven learners in total came to tutorial sessions in basic math, reading strategies and computer training on a weekly basis. In all cases, the learners had sparse, sporadic and distant formal educational histories. They lacked confidence in their ability to learn and were apprehensive and emotional about returning to



the process. Since some were afraid they would lose their jobs, the first step was to create a climate for them to think positively about learning.

Each tutorial session started with learners voicing opinions and expressing concerns about work tasks, errors and accuracy at work, about co-workers and about their feelings for learning - past and present. This initial dialogue helped to calm their nervousness and was the segue into the learning session. This part of the formal training session with each worker helped to dispel notions of being unable to learn new tasks and the possibility of losing their job. The sessions further motivated informal learning and sharing, bolstered their confidence and provided hope for an easy transition to technological changes that initially seemed so intimidating and daunting.

## The case story

The data for this case study is informed by the voices of worker learners at Uni-Select Edmonton and workplace instructors in work-sites in Northern Alberta and the Northwest Territories. Learners openly spoke about their learning experiences while workplace instructors discussed workers' learning paths based on their observations and previous teaching experiences. From the data, I uncovered several themes about the workers' route to learning. I discovered that their pathways are driven by several factors: learning catalysts, key dynamics around participation, workers' expectations of informal learning, the actual learning

process, benefits of formal and informal training and personal learning power. Each of these key ideas is discussed.

## Catalysts for learning

The first significant theme which impacts workers' learning paths relates to trigger events. The catalyst for training at the warehouse was a change in work procedure. Selected warehouse workers were required to upgrade their skills and, thus, were steered into a formal training program to prepare them for the new WMS. Learners, although anxious about the learning, were cooperative and willing to take the challenge. Once they started the program, their attitude and motivation toward learning changed. They said that there was a potential to gain knowledge, concrete skills and strategies but most importantly the training served to reduce their fears around the new WMS technology. In my pre-lesson discussions with workers, I observed the effect of the formal training as workers told me about their informal learning activities. For example, workers said that they were more motivated to ask questions and to seek out conversations and discussions about the computer with their co-workers and others outside of work.

Workplace instructors reaffirmed that trigger events such as a company need expressed by employers or employees can create the conditions for workers to engage in formal or informal learning. An example of an external trigger event could be a new work procedure imposed by technological change while an internal



trigger could be a worker's desire to improve leadership skills for a new role at the workplace. In terms of informal learning one instructor, Anita, said that, "learners are inspired to go beyond formal learning to fulfill a need, an interest, and, if there is, a perceived injustice or agitation". Lynne, another instructor stated that "curiosity, the drive to do their job better, motivation and a personal satisfaction to improve skills" were all types of internal triggers for workers to learn at work.

### Key dynamics that determine participation and success in learning

Success and participation in the workers' learning were affected by personal dispositions, training opportunities and the learning environment. Instructors mentioned that employees' success and degree of participation in workplace learning cluster around five key categories. The first one, dispositional qualities, speaks to workers' personal characteristics of self-direction, creativity, and degree of independence. The second reason relates to the availability of relevant learning opportunities, program packaging and appropriate materials. Situational factors, a third variable mentioned, addresses a holistic approach to the worker couched in their social, economic and cultural support systems. The fourth factor, the physical aspects such as ergonomics (room set-up, air quality), good diet, good health and home environment also influence success. The last determinant of success and participation is the learning environment which centres on the worker/trainer relationship and on providing a

non-threatening atmosphere where learning styles are validated. Lynne commented that learners' participation in learning is:

"determined by personal commitment, dedication, having things in place in their personal lives, having a certain level of confidence to allow for the occasional mistake or failure, having the ability to deal with criticism, conflict and difficulties, and having an interest and the ability to manage stress."

Anita added that:

"We need to look at the whole program and the people, their learning styles, at diet and the workers environment as well as the outside factors which are out of our control. Societal, cultural and economic factors come into play. All of this impacts learners' success. Inside our programs, we need to ask: Are we connecting with students and what they want? Where are they coming from and what is their physical and emotional situation? Who are they and how do they learn?"

Lynne believes that an appropriate learning environment and instructor/learner relationship is critical to a successful learning experience. She stated that there is a need for:

"the trainer or instructor to be respectful, pace the instruction at a level workers can manage, ensure that materials are adapted for the proper literacy level, present material or information in a multi-sensory manner, follow up with learners progress, take a personal interest in learners, coach and encourage learners, maintain confidentiality, listen to learners' concerns and give them a voice."



In a sample of worker responses taken from the Effective Lifelong Learning Inventory (ELLI) survey which they completed, the degree of learner success and participation in learning is revealed in their dispositional tendencies. Although positive toward learning, the warehouse learners are predisposed toward dependency. They prefer learning that is clear-cut and concrete. Workers wish to learn things thoroughly with lots of help because they do not like feelings of confusion and uncertainty. In the face-to-face interviews, learners validated this view. They said they accept learning from a teacher or a supervisor because these authority figures understand “what it’s about”. Sarah, one of the workers, who left school in grade eight, finds learning challenging and “has to do things more times than once for things to stick in her mind”. She likes one-on-one help with an “understanding instructor who has lots of patience and knows what to do”.

In terms of the growth orientation and taking on challenges as measured by the ELLI, there was some variation in the workers’ responses. A few learners expressed that they liked to pose questions while learning and when interested in something, found it easy to learn and often changed the way they did things as a result of the new learning. In contrast, one workers’ results suggested that there was little interest in questioning and improving as a learner.

## Workers’ expectations of learning

The third key pattern determining workers’ learning pathways revolves around their expectations of learning. Instructors mentioned that

learners expect to gain concrete skills and strategies to improve job performance and promotional opportunities, and build greater confidence and self-esteem. Such skills included leadership, interview and supervisory skills and the nine essential skills as defined by Human Resources and Skills Development Canada (HRSDC). Furthermore, instructors believed that learners expected that workplace programs would give them an exposure to current affairs, health and safety notices, and relevant topics in the work world by using the newspaper and internet. Anita goes on to say:

“Learners should expect to achieve strategies and skills towards personal wellness that enable them to deal with stress at the work site, learn about healthy alternatives and good nutrition, and manage shift work.”

Instructors said that workers could expect to transfer important learnings from a formal workplace program to their personal lives. This transfer has the potential to develop an array of life skills which include time, stress, crisis and money management, strategies for personal wellness, and managing shift work and camp life. Essential skills transferred to personal use include math skills, oral communication practice, interpersonal skills, and basic computer skills. Anita added that:

“an improved sense of workers value and esteem helps them explore personal goals at home and subsequently leads to more community involvement which could include leadership roles.”

Instructors also said that workers expect formal programs to motivate them to improve their



education and to improve their accuracy with workplace tasks. In addition, workers have a need to show others they can do new tasks at work and improve their ability to solve a problem.

### **Informal learning: Activities and opportunities**

Another emergent theme that relates to the learning pathways are the activities and opportunities that enable workers to learn at work in an informal way - individually or with co-workers. The workplace provides opportunities for informal learning for employees, who tend to be participation oriented and experience-based, and who use oral communication and observation as common conduits for learning. Workers described the following types of informal activities: asking questions, getting advice from a supervisor or experienced co-worker, and watching a supervisor demonstrate a procedure. They also said that in an informal way, they develop their own system, often through using trial and error, past experience and prior knowledge. Through the course of their work day, they learn informally by watching co-workers and new workers, and learning from co-workers' mistakes when "observing them being critiqued at work". Sam, a learner, said that informal learning occurs when he "observes, listens and learns".

Worksite meetings are an important source of informal learning opportunities. Workers said that they learn informally by listening at meetings at which time they hear about work related mistakes or errors. They also learn about prod-

uct information and warehouse activities, and about trade show orders and its relevance to inventory. Once the WMS is in place in the company, Larry, a worker, said he will learn by using the WMS manual provided by the supervisors.

The workers' journals exposed similar information about these types of informal learning activities. Workers wrote about how they learn and understand informally when they teach and coach new hires. For example, Sam had to "interpret the rules to some new hires and coach them in what was taught to him and what he learned on his own through trial and error". In teaching someone he said, "it helped me learn a different perspective on how to do something and how to do it better". This improved his work accuracy and it reduced the stress. In another example, Sarah helped a new supervisor learn about the Transportation of Dangerous Goods relevant to the warehouse and some work procedures. Emily had the opportunity to observe and refresh her skills on how to input pick ticket numbers in a computer. She said informal learning has helped her become more accurate and efficient in finding some of the products, in moving them and spacing them out.

Instructors confirmed this idea and as Anita so aptly put it, "the biggest learning is often informal". Lynne reported that informal learning activities were wide ranging at her worksite and gave examples such as one-on-one consultation about resume writing as well as participation at committee safety meetings where workers rotate the role of chair. Anita believes that informal learning happens most often in a face-to-face encounter and is the result of a



work need. Several examples of the strategies and techniques that employees use to learn something informally at work were named. Common examples of informal learning were through casual dialogue at meals and coffee breaks or asking questions from an adult educator, team leader, and co-workers. Coffee table chats and lunch discussions often linked to grievances or unforeseen crises, or issues of wellness or the internet were common areas of informal learning. Role-modeling was also cited as way of learning informally. In the classroom, workers tended to learn through conversations, observation, and storytelling with classmates and the instructor.

Instructors pointed out that there are many opportunities within the workplace structure for building a worker's learning path. One example from a different company was through workplace committees such as the Emergency Response Team, Occupational Health & Safety Committee, and the Mine Rescue team. Workers learn and move into leadership roles by participating in leadership development programs. Lynne also stated that informal opportunities exist when learning about workplace policies and regulations such as Bear Awareness Safety, Fire Extinguisher Safety, the Zero Harm to People and Environment program or the Cross Cultural Exchange. Informal learning also occurs through workplace practices such as peer coaching of new hires, Health Safety Environment Community initiatives and workplace coordinated events such as festivals and recreational activities.

Although workplace committees and teams existed in the warehouse company, workers in

my program lacked confidence which prevented them from being active. However, they did confirm that they learn informally when they coach or mentor new hires and that they will have a greater opportunity to practice their newly learned skills when the new WMS system is implemented.

### Learning as a process

Social processes and relationships between people and their environment are part of learning and training. In this fifth category, learners and instructors both emphasized the importance of a trusting relationship among instructors, employers, and supervisors. This enabled a successful learning journey. Sam summed up the importance of relations in this statement:

“I prefer to learn by connecting with a person and the subject and then concentrating on this variable. The climate needs to be comfortable and there are no threats. It took three sessions (...with me) before I dropped my guard. It was learning that felt good and I learned what I needed to know.”

Friendships, informal interactions, and social bonds are essential anchors. Anita stated:

“from the outset, it is important to build relationships, trust and develop basic life skills through sharing, dialogue and non-verbal communications to reduce anxiety and create a culture of learning and equality.”

Lynne mentioned the critical need to be collaborative and compassionate and to “listen to



learners, give them an opportunity to have a voice and above all, encourage them- the last one is a big one”.

An important part of the relationship in a learning setting is the necessity of acknowledging workers’ efforts. Lynne said employees appreciate a thank you from their boss for doing a good job and like to be praised for demonstrating what they have learned. Instructors confirmed this idea and suggested that credit or recognition for informal learning appear on their annual performance review and in the company newsletter. In addition, skill sets could be included on their resumes and appear as a pay increment. Another good idea that Lynne offered was the use of posters where informal learning activities could be listed at the work site. A good point was raised when Anita questioned whether “credit was really needed but how does one measure informal learning”? She added that a possible method for crediting could be through providing workers with an opportunity to be consulted in organizational change, restructuring, and visioning.

Social processes at work that are embedded in informal learning activities also result in tacit skills and knowledge. Instructors gave these examples: getting along with others, learned ways of achieving personal satisfaction, and a change in the traditional cultural attitude towards self-reliance and independence. These tacit skills often result in transformation of behaviors, values, and norms through non-verbal cues, body language, observation and unwritten codes of conduct.

## Perceptions of the benefits of formal and informal training

The perceived benefits of formal and informal training influence decision making on a worker’s pathway to learning. In this theme area, workers voiced opinions about the benefits of learning as applied to their ability to perform their job better, to understand the idea of how projects operate, and to make them feel better about themselves. Sam said that the program helped to reduce the fear of technology, a fear based on lack of knowledge and a concern that the ‘gun’ would take his job away. After participating in the formal program, workers were more comfortable doing their job instead of being fearful of it. Sam remarked that, “the course has made me more at ease with the diagnostic parts of the gun”. However, Sarah, another worker, wasn’t sure she could see many benefits until WMS was brought in.

Workers spoke about the benefits of informal learning for the company, such as greater accuracy because products are packaged and labeled properly. The program, workers also said, would benefit the company by making work more efficient and, thus, facilitating better and faster production and in turn more profit for the company. Sam commented that “informal learning takes the responsibility away from the formal training the supervisors would do”.

Instructors believe that formal and informal learning which happen simultaneously have many benefits for the company and for the employees. Benefits on the job consist of fewer



accidents and incidents, less conflict, and greater efficiency. Employees' motivation, morale and confidence increase and they feel safer and happier. There is an increase in retention, a higher commitment to job performance, a better workplace atmosphere and increased learning and harmony. In some cases, Anita commented, learning can have negative as well as positive consequences. Negative implications to learning may surface through passive aggressive behaviors and worker agitation with unpopular workplace policies at their worksite, which are often discussed and compared to the policies of other companies.

### Lifelong learning and learning power

Another theme along a worker's learning path relates to learning power and continuous learning. Workers have an awareness that learning is ongoing and continuous but for some, learning seems only to exist at the workplace. Nonetheless, workers were able to define lifelong learning in their own terms. They said it happens through interactions and conversations with others or through information gained from books at the library or by watching TV or reading a book. Larry knows that things he has learned at work are ingrained and he will not forget them. Sam was very clear about this point and said that ongoing learning for him means "to glean knowledge so that a person is not ignorant about any type of subject. It is learning for all of your life because times and information are changing". Sarah voiced her opinion by stating that:

"Lifelong learning is when you learn something new everyday. Then it's not so boring. It is forever as far as I am concerned – it's at home, work or whoever you talk to, other people not just one person. If you can learn stuff at work it would be more interesting. If you don't learn, you're not developing yourself. You can't develop if you don't do different things. It has to be constant otherwise I would forget until I get the hang of it. When you get good then you can remember. Like the computer. You need to practice to get better."

Although workers could describe their ideas about lifelong learning, a look at the ELLI survey results revealed that they exhibit an uncertain and tentative attitude toward learning. Learners appear to be dependent on others for help and guidance and are less prone to pose questions. They are somewhat apprehensive about participating in new learning at work or at home, and generally show less critical curiosity and self-direction. These traits may be shaped by what is expected of workers in their jobs and by workplace structures.

### The relationship between formal and informal learning

When all is said and done, I have found that the research gives evidence of the close association between formal and informal learning. The instructors validated this idea of a linkage between the two learning systems. They felt that available opportunities at work through workplace committees, peer coaching, workplace structures and regulations, and onsite



work or social events induce both formal and informal learning.

Formal and informal training are very connected and integrated at the workplace and “feed on each other”. As Lynne pointed out “formal training lays the groundwork for informal learning and allows the learner to take initiative”. The process builds capacity for a successful learning journey for workers. In a similar vein, Anita remarked that:

“Formal training needs the spiritual and holistic dimension of informal learning and lays the ground work for informal learning that allows learners to take initiative. Informal learning

arises from formal learning, the energy of the organization and the attitude of the participants. It is often fuelled by the powers of observation, sub-consciousness, passion, interest and need. Yet, if there is only informal learning, you often have “dead” and “soul-less” workplaces.”

Thus, the results of the research clearly point out that informal and formal learning are blended and are part and parcel of the learning path for learners. Although context-specific and situated, they both hold properties which are separate yet parallel and above all are key to the workplace.