

The Marriage of Formal & Informal Learning

by Marty Rosenheck

I don't usually peruse the society pages of Training Today, but this posting really caught my interest. Why should we care about this particular marriage? The main reason to take note is that we are finally realizing that each has their strong points, however neither formal nor informal learning, is working as well as it could alone. By understanding their strengths, weaknesses and differences, we can create a synthesis that can take learning, engagement, productivity and innovation to unprecedented levels in our organizations.

First let me introduce the happy couple...

Formal Learning, which includes classroom training, synchronous and asynchronous elearning, and workbooks, has only been used in the workplace to any great degree since WW2. Of course, Formal Learning can be efficient and good for getting new people up to speed. But it is relatively expensive to develop, quickly gets outdated, and has been only marginally successful in translating to performance on the job.

Informal Learning has been around the workplace much longer than Formal Learning and includes all the ways that people have learned on the job, including trial and error, conversations, observation, asking questions, and apprenticeship. ASTD defines Informal Learning in the negative as "a learning activity that is not easily recognizable as formal training and performance support." Generally speaking, it takes place without a conventional instructor and is employee-controlled in terms of breadth, depth, and timing. It tends to be individualized, limited in scope, and utilized in small chunks. Informal Learning can be quite job-relevant and occurs as needed, but is often inefficient, haphazard, and slow.

A MARRIAGE MADE IN HEAVEN

The imperatives of the marketplace and the economic downturn have made this



Research suggests that only about 20% of workplace learning is formal and 80% is informal. The relative costs are harder to measure; we know how much is spent on formal learning, but informal learning costs do not usually appear explicitly in any budget.

a shotgun marriage. Formal Learning is just not making it on its own. Organizations are not investing what they had been in developing and delivering formal training, resulting in cost cutting and reduction of the ranks of training and development staff (see the latest ASTD State of the Industry Report). At the same time, there are greater demands from the global market to keep up with rapid changes

through faster, cheaper, on-demand learning methods. Informal Learning, with all its virtues, is not making it on its own either. It is too inconsistent and haphazard to keep organizations competitive. Many organizations know they need to see this marriage succeed but they are struggling to figure out how to make it work.

The good news is that this marriage has a greater chance of success now than ever. This is because of the groundwork that is being laid by technology and a broadening recognition by leadership that, as Jacob Bronowski, author of *The Ascent of Man* said, "Knowledge is our destiny." There are three factors that make it possible for this to succeed and produce

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engaged, cooperative, intentional learners and innovators:

- Leadership Support
- Culture Change
- Technology

Leadership Support. For any major change to take hold, it must be supported from the top. This needs not only the blessing of key leaders, but their active promotion and involvement. It is important that integration of formal and informal learning have champions both in the corporate leadership and in the business units. When one large industrial supply distributor began using a Twitter-like tool called Yammer, it was met with very limited use and acceptance. However, once the CEO started using it, the usage and participation skyrocketed almost overnight. Formal and Informal learning, depend on the encouragement and financial support of their leaders.

Technology. The recent wave of technology, especially Web 2.0 technology is a key enabler for this marriage. These technology tools and infrastructures include easy to use authoring tools (e.g., Articulate, Captivate, Lectora), learning and content management systems, knowledge repository and sharing tools (e.g., SharePoint, wikis, forums), social media and networking tools (e.g., Facebook, Twitter, YouTube or their internal equivalents), virtual collaboration and learning spaces (e.g., Google docs, web conferencing, Second Life) and mobile devices (e.g., smartphones, tablet PCs). Many of these tools are inexpensive (or even free) to obtain and implement. They provide the “plumbing” and “wiring” that enable informal and formal learning to live together in their “new home.”

Learning Culture. Technological tools and leadership support alone will not be enough to make the marriage of informal and formal learning work. The shared values, beliefs, mental models, habits, and behaviors of the workforce in an organization – its **culture** is key. How do people in an organization relate to each other? Is there trust in each other and in the leaders? How do people feel about knowledge – is it power to be hoarded, or a gift to be shared? How do they feel about the

value of cooperation and competition? Do they see learning as a separate activity or as an integral part of their jobs? Culture is also the most difficult thing to change. A new shared culture evolves through a process that can sometimes be quite messy. It can be initiated through the marriage of formal and informal learning, supported by leadership, and enabled by technologies.

THE FOUR OFFSPRING

Formal and Informal learning differ along four dimensions. When they come together, they can, (with a little help from leadership, technology, and a learning culture) produce results that are syntheses of these seemingly antithetical perspectives. These are the potential outcomes of a successful talent development strategy.

	FORMAL	SYNTHESIS	INFORMAL
GOALS	Organizational	Engagement	Individual
CONTROL	Central	Cooperation	Distribute
LEARNING	Structured	Intentional Learning	Incidental
KNOWLEDGE	Transmission	Innovation	Application

GOALS (ORGANIZATIONAL VS. INDIVIDUAL FOCUS) → ENGAGEMENT

Formal learning is often geared towards **organizational** goals. In fact, learning and performance departments have worked hard to make sure their offerings are based on a solid needs analysis and are aligned with the organization’s strategy and the learning needs of their internal clients. The problem is that individual learners (and their managers) often do not see the value and relevance of the formal training to their jobs (despite efforts to make the WIIFM clear). On the other hand, Informal learning is generally more directly tied to **individual** needs and goals. Unfortunately, what people learn informally may not be exactly what the organization needs them to learn and do. This mismatch can lead to frustration and sometimes downright discouragement.

When informal learning is supported by a formal infrastructure and encouraged by the leadership, it can be set up to align both organizational and individual goals. For learning to be truly embraced by leaders, it needs to clearly support core business processes and lead to increased sales, productivity, customer service, and innovation. When a person’s individual goals (and I mean this in the broad sense of the word: career aspirations, motivations like desire for recognition and challenging work, a sense of belonging and community) are aligned with organizational goals – the result is **employee engagement!** Employee engagement has been shown in many studies to correlate with superior individual and organizational performance.

CONTROL (CENTRAL VS. DISTRIBUTED) → COOPERATION

Formal learning is generally **centralized**. The control over what, when, and how something is learned is located in the learning and development group. This group, on behalf of the larger organization, creates a curriculum, sets requirements, creates content (working with SMEs), develops courses, and delivers training. This approach can be useful, especially for getting larger groups of people up to speed with consistent content (for example, new hire training, compliance training, or new product training). The challenges of centrally controlled formal learning are many: it can be expensive to develop up front; it cannot capture all of the volume and nuances of what people need to do their jobs; it can be difficult to keep up with all the changing needs in the field; em-

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employees don't have to take responsibility for their own learning; and only a small portion of the formal learning transfers to application on the job.

Informal learning is generally **decentralized** or distributed throughout the organization. It is controlled by the individual who chooses (or not) to seek help or ask a question. For it to work, people need to be self-directed learners. The two key advantages of informal learning are that it happens at the point of need and what is learned is usually applied right away. On the other hand the decentralized nature of informal learning means that it can lead to inconsistent practices, it is haphazard, and it can be quite inefficient.

A result of formal and informal learning is shared control – or **cooperation**. Cooperation is defined by the American Heritage dictionary as “The association of persons or businesses for common, usually economic, benefit.” In the cooperative model, the learning and development group can shift from being the producer of content to being the guide, initiator, facilitator, and coach. Based on alignment with agreed upon organizational and learning goals, the learner takes responsibility for his or her own learning – with the support and guidance of the organization.

For example, John Moxley, Director of Leadership Development, OD, and Learning at Cricket Communications, a rapidly growing telecommunications company had realized that their small central learning group could not produce all of the desired training for a decentralized group of employees in a fast paced and rapidly changing environment. They created, in cooperation with the business unit managers, a detailed checklist of the key things that people in each job needed to know how to do. This was at a more fine-grained level than most competency lists. They then used an online tracking tool to provide the list to employees, who could choose how and when (within a target timeframe) they would learn each item while on the job. Some chose to take a brief elearning course, others asked a colleague or manager to help, and some

used text messaging to get tips from friends as they were performing the task. Using the tracking technology gave the organization the knowledge that people were learning what they needed to learn – while leaving control over how and when they learn in the hands of the learners.

One often overlooked way that organizations can support self directed and cooperative learning is to provide training on “learning to learn ” and on how to use the social learning and tools and resources for learning that are available to them. People who are not used to working in a learning organization culture, where cooperative learning within communities of practice is the norm, need the knowhow and a new mindset regarding learning to cooperatively in the workplace.

LEARNING (STRUCTURED VS. INCIDENTAL) → INTENTIONAL LEARNING

Formal learning is generally highly **structured**. Content is presented by the trainer (or elearning or video) and received by the learner. In more interactive training methods, the learning is structured and directed by the instructor or the instructional designer. Formal training events are usually scheduled for the learner, and take place away from the work environment. This highly structured learning can be very effective for novices and for learning relatively well defined domains of knowledge. It is not as helpful for learning how to handle complex and nuanced situations (which are often encountered in real life by managers, sales people, customer service reps, technicians, etc.).

Informal learning, on the other hand, is **incidental**. It involves learning by doing though experience at the moment of need and is embedded in the workflow. Informal learning is inductive, and often occurs unconsciously in the course of doing a task or solving a problem. The positive is that this incidental learning doesn't take people away from the work. The disadvantage is that when they are so caught up in doing, people often miss an important ingredient for learning: reflection.

The combination of structured and inci-

dental learning can give us **intentional learning**. Cognitive psychologists Carl Bereiter and Marlene Scardamalia use the term “intentional learning” to refer to “cognitive processes that have learning as a goal rather than an incidental outcome. All experience,” they assume, “can have learning as an incidental outcome, but only some cognitive activity is carried out according to procedures that contain learning goals.” The integration of formal and informal learning, makes learning an integral part of everyone's job, so that when people encounter new situations they see them as opportunities to learn. The formal component of intentional learning can serve to make the goals for learning clear and to provide a framework for turning experience into lessons learned.

The key to solidifying this learning is reflection. An expert on organizational behavior, David Kolb, wrote about a model of experiential learning consisting of the following cycle: action, observation, reflection, concept formation, and back to action. The act of pausing to observe and reflect turns experience into learning that can be applied to new situations. For example, leadership researchers, Morgan McCall and George Hollenbeck asked managers to stop once a week and answer just two simple questions, “What did you do last week?” and “What did you learn from it?” They found that this simple process of reflection enabled the managers learn from their experiences and to change the way they managed.

This is where the importance of the **community of practice** comes in. “The community creates the social fabric of learning,” according to Etienne Wenger, one of the originators of the concept of communities of practice. A community of practice provides a context for people to reflect, reinforce and extend their knowledge by discussing it with each other, either in person or through distance technologies or social media.

Technology is not necessary for communities of practice to exist (though the water cooler is a technology of sorts). They

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form when people with common interests and goals talk informally in the hallway, ask each other questions, and share their insights. However, technology – and especially Web 2.0 technologies – can extend the reach, increase the number of possible connections, enable finding the right person or information, and track the effectiveness of communities of practice.

KNOWLEDGE (TRANSMISSION VS. APPLICATION) → INNOVATION

Formal learning is focused on **transmission** of knowledge. It involves gathering

knowledge from SMEs, creating content and developing learning activities to impart that content. The focus is on knowledge transmission with the understanding (hope?) that application to the job will happen later. Informal learning is all about immediate **application**. I need to do something, I get the help or look up the information I need to do it, and then apply it immediately. It is about learning by doing, and using what I learn.

The marriage of formal and informal learning can help people get proficient at their jobs quickly and efficiently. More importantly, the integration of the two

can move us beyond knowledge transmission and application to knowledge creation – **innovation**. As communities of practice develop more knowledgeable members, they begin to generate new ideas and ways of doing things; they share their insights with other community members, who in turn build upon those ideas. The integration of formal and informal learning can create a virtuous cycle that leads not only to increased productivity but to the real innovation that is necessary for long term success in a dynamic marketplace.

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