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The Interplay between Formal and Informal Training for Basic-Level Workers: Comparing Experiences in Canada and the United Kingdom

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Abstract: This study investigated the types of formal and informal training activities of basic level employees using a qualitative multi-site case study research design. Seven programs from Canada and four programs from the North and South of England were chosen from small, medium and large businesses. The range of formal and informal training activities is described as well as a preliminary analysis of informal learning as both an activity and as a process for workers improving their literacy skills.

Introduction

Countries like Canada and the United Kingdom have become increasingly concerned about the skills of the workforce, especially for those adult workers with low literacy levels. Myers and de Broucher (2006) claim that a large portion of Canada's adult population is not equipped to participate in a knowledge-based society. For example, 5.8 million Canadians aged 25 years and over do not have a high school diploma and 9 million Canadians aged 16 to 65 years have literacy skills below the level considered as necessary to live and work in today's society (pp. 3-10). Similarly, in the United Kingdom, 7 million adults or 20% of the population were estimated to have problems with basic skills deficiencies in the workplace (Evans, Waite, Ananiadou, Wolf & Aspin, 2005). Canadian evidence also suggests that adult learning does have the potential to significantly change the economic well being of those with relatively low educational attainment. For example, Zhang and Palameta (2006) found that most men and some women who obtained a post-secondary certificate later in life enjoyed sizable wage and earning gains. Furthermore, Coulombe and Tremblay (2005) maintain that a one percent increase in a country's score on the international test for adult literacy is associated with an eventual 2.5 percent relative rise in labour productivity and a 1.5 percent rise in GDP per capita.

In a review of literature on the impact of workplace basic skills training as measured by their effects on wages and employment probability, Ananiadou, Jenkins and Wolf (2003) suggested that better numeracy and literacy skills have a strong positive effect on individuals' earnings and employment stability. In addition, these UK researchers state that "there is also good evidence to suggest that general training provided at the workplace has a positive impact on individuals' wages, particularly when this training is employer provided rather than off the job" (p.289). Workplace training, therefore, can play a significant role in increasing inadequate levels of workforce skills. Recently, types of formal and informal training activities for the more skilled workers have been documented. However, there is a paucity of information about the types of training activities that basic-level workers participate in. The key research questions for this study were: (1) What types of formal and informal training activities do basic-level employees engage in? and (2) How are these training activities related?

Theoretical Context and Related Literature

The theoretical context for this study is drawn from both the formal and informal adult learning literature. Since definitions for these activities abound in the research, the report on the Adult Education and Training Survey, (AETS) which looked at Canadian adult workers training was used to operationalize training activities (Peters, 2004). The AETS defined formal job related training as courses or programs related to a worker's current or future job. These courses and programs have a structured plan whereby an employee led by an instructor or trainer follows a program and receives some form of formal recognition upon completion, such as a certificate or high school diploma. Informal job-related training is training that involved little or no reliance on pre-determined guidelines for its organization, delivery or assessment. It does not lead to any formal qualification or certification and is undertaken by the participant with specific intention or developing job-related skills or knowledge.

As Merriam, Caffarella and Baumgartner (2007) point out demographics, the global economy and technology have come together in adult education in the blurring of the field's content and delivery mechanisms. This blurring is evident in the use of such terms as formal, non formal and informal learning. However various frameworks help sort out these adult learning distinctions. For example, Foley (2004) provides a framework for depicting the different forms of adult learning including informal and incidental learning. His descriptions help form a typology for the area of workplace training and learning. Marsick and Watkins (2001) have also developed a model for understanding incidental learning that occurs in everyday life while Schugurensky (2000) proposes self directed learning, incidental learning and tacit learning as internal forms that are important to distinguish the phenomenon. Using these works, Taylor (2006) examined the informal learning practices of adults with low literacy skills at home, in the community and at the work site. It was found that employees with less than grade nine used the infrastructure of a small company such as safety committee meetings and peer group tool box meetings to learn informally and practice their reading skills, problem solving skills and oral communication skills. In a similar vein, Evans, Kersh and Kontiainen (2004) described the tacit forms of personal competencies in the training and work re-entry of adults with interrupted occupational biographies. The authors identified the ways in which the recognition and development of such informal learning can be harnessed in various workplace environments.

Methodology

The methodology for this investigation used a multi-site case study design. Through various data collection methods, seven different types of formal workplace literacy programs situated in small, medium and large companies were chosen in Canada. These companies were from the manufacturing, automotive and fisheries sectors. In the United Kingdom, examples of four types of programs were chosen in the North and South of England from the transportation, service and food processing sectors. Comparable items were developed for the instrumentation which consisted of a trainee and instructor semi-structured interview schedules; worker journals; and artifacts from each work-site. Thirty-three trainees and 18 instructors from the various workplace programs participated in the interviews while 21 workers completed weekly journals documenting their experiences with informal learning at the worksite. These journals were kept after the employees had completed the formal workplace education program. Interview data, field notes and worker journals collected over three months were transformed into research narratives, member checked and subjected to analysis using the constant comparative technique (Merriam 2001). Case studies were written for each of the organizations which included a

description of the company, the formal program and the workers experiences with informal learning at the shop floor level. Separate databases from each country were developed and are being used for comparable purposes. In the UK, this database is part of the Economic and Social Research Council's Teaching and Learning Research Program and the National Research and Development Centre for Adult Literacy and Numeracy. This longitudinal study aims to develop a theoretically informed and evidence based analysis of both immediate and longer-term outcomes of workplace-linked interventions designed to improve adult basic skills.

Interpretation of Findings

Based on the Canadian and UK data, workplace basic skills training can be categorized into formal and informal. In the larger and medium sized companies, a much wider range of general learning programs were provided to employees and included up-grading, ESL, computer, communication and leadership training. These programs were usually offered in a Learning Centre at the worksite and provided some type of sequenced curriculum taught by a qualified instructor resulting in a form of certification. For example, Canadian participants such as sewers, framers, fork lift operators and fish plant processors were enrolled in the GED upgrading classes at the worksite in preparation for the grade 12 equivalency exam. In the smaller type companies, UK training opportunities tended to be shorter types of learning experiences such as report writing, communication and computer workshops. Across these UK companies most of the workers had literacy, language and numeracy content incorporated into the programs which were designed to develop essential work skills and general employee development.

One of the key findings of the study was that employee participation in a formal program acted as the catalyst for the various informal training activities that occurred back on the shop floor. Participating in a class or in a tutorial session heightened employee awareness of the importance to learn. This interplay between formal and informal training could be viewed as synergetic and connective. As one instructor said, "it was like employees were re-awakened to their own learning capabilities as a result of the program and this provided a different viewpoint about their workplace and their jobs". Back on the floor, employees experienced a certain type of assuredness in their literacy skills to try their regular or associated job tasks in different ways through informal learning.

Based on the data, two different but related conceptions of informal learning can be seen. One conception is workplace learning type and the other is at the trigger event and attitude level which might be categorized as the workplace informal learning process. Five types of workplace informal learning emerged from the case studies. The first type "Observing from Knowledgeables" included learning a new task or the same job task in a different way from a more proficient co-worker or supervisor. This often meant that the worker self-identified a mistake or error in a job task and searched for an expert to observe doing the same task. "Practicing without Supervision" was a second type. For the most part, workers sought after new experiences where they could practice a skill, like problem solving, or participate in the company in a new way such as joining a union or safety committee. A third type is "Searching Independently for Information". Workers often used their reading and computer skills to search for new kinds of information on a challenge presented in the routines of the work day. Frequently, the Internet, Intranet and work manuals were used for this information search. If employees had already taken a company computer program there was transfer of learning and if not some initial guidance by a co-worker was provided. "Focused Workplace Discussions" with peers and supervisors was another main type of informal learning. Employees used questioning

and summarizing skills to engage in workplace updates. They sometimes exchanged e-mails around work task procedures and for reporting new changes. "Mentoring and Coaching" was another type of informal learning. Most workers who taught a co-worker how to perform a job-related task reported that this was an important way of learning. They realized that they first had to talk through the steps of the job task and understand the sequencing before coaching another worker.

As an informal learning process, three patterns emerged from the data - trigger events, attitudes towards lifelong learning and inner recognition. The trigger events that prompted the informal learning were mainly related to a company ethos of quality performance and safety concerns within the work environment. Employees who belonged to companies that had a well defined and visible learning culture wanted to perform better for the organization or the customer. Most often workers who had completed a formal workplace education program returned to the factory floor with a heightened awareness that some work responsibilities could be done differently. For example, fish plant processors became aware of another method for packaging a product or the leather cutters who realized that there was a more efficient way of communicating measurements with its satellite company in Mexico. These events triggered independent learning. Coupled with this was a certain attitude held by the workers about lifelong learning. Some employees had a curiosity about wanting to learn new things at the workplace. These workers believed they possessed the creativity and imagination to learn. Other workers "exhibited an uncertain and tentative attitude toward learning. They felt more dependent on others for help and guidance and less prone to pose questions". A third part of the process may be related to an inner recognition that the informal learning activity has personal and work benefits. This is evidenced in increased worker self-esteem. It is interesting to note that most employees were not motivated to learn informally for monetary rewards or the possibility of upward mobility. They were "spurred on by the need for a challenge or variety in the everyday work routine".

Particular to the UK database, employees' personal and educational backgrounds as well as skills they had learned from a variety of experiences in and out of paid employment influenced the ways in which they carried out their duties, responsibilities and dealt with various workplace situations. Yet this was not a deterministic process. It was found that formal workplace programs had the potential to compensate for previously negative educational experiences and to respond to individuals' shifting approach to informal learning. Worker readiness and motivation to learn can have many origins. In the context of literacy learning, longitudinal tracking and in-depth interviews have provided important channels for exploring employees' experience with, and strategies for coping with, literacy in the workplace and in their personal lives. These workers' own perceptions of whether they are coping with their existing levels of skills within or outside work challenge straight forward assumptions, underpinning the UK government's 'Skills for Life' agenda. These assumptions are about the existence of large-scale skills deficiencies and their direct impact on productivity with a more nuanced approach that emphasizes individual strategies for coping with literacy practices and their own literacy needs whilst highlighting those cases where skills gaps exist and where employees have indeed been positively affected by workplace courses. In all cases, there were significant gains in abilities for the individual worker. The extent to which these translated into gains for the employer was much more mixed. There is a need to consider how the wider organizational environment itself needs development if it is to support rather than undermine investment in learning. Workplace learning programs need to be supported by learning rich working

environments that support the engagement of the workers if they are to be successfully sustained. In the longer term, the UK research team is investigating how far learning outcomes may be linked with development of social capital within organization as well as in the wider lives of the adult workers.

Implications for Adult Education Theory and Practice

Results of this study provide some new evidence on the nature and scope of formal and informal training activities for basic level employees. It also begins to trace how this informal training is structured and the kinds of decisions workers make in the learning process. This information could be integrated into the existing frameworks for understanding informal learning at the workplace. One particular framework that may be useful in interpreting some of our findings is the work of Eraut regarding the factors that affect workplace learning. Based on a series of large and small scale projects investigating informal learning in the workplace, Eraut (2004) described the triangular relationships of learning factors and context factors. Of particular interest to this study is the interplay among confidence, challenge and support. Workers in this study clearly stated the importance of their newly acquired confidence in seeking out informal learning after participating in a formal program. This confidence may be similar to what Bandura (1998) calls agency. A worker's agency changes as he or she successfully meets challenges in everyday work routines that require learning. However, this confidence to take on new challenges is dependent on the extent to which workers felt supported in that endeavor. This support is not only provided by a superior but also through supportive co-worker relationships that are perceived to be important. As Eraut (2004) points out "if there is neither a challenge nor sufficient support to encourage a person to seek out or respond to a challenge, then confidence declines and with it the motivation to learn" (p. 269). As opposed to identifying productivity gains relating to both formal and informal training it may be more advantageous to better understand employee job satisfaction and engagement with the workplace. Evans *et. al.* (2005) believe that many of the more positive efforts of workplace learning are linked to enhanced engagement with people and activities both inside and outside of the workplace. It could well be that forms of social capital may be operating to consolidate and reproduce hierarchies and power relations in the workplace as well as (or instead of) engaging people more closely with each other and the workplace.

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