THE FIRST RESEARCH TASK: DEFINING INFORMAL LEARNING WITHIN THE CONTEXT OF THE WORKPLACE
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The first, and most challenging, task in any research project is defining the phenomena to be studied. Experimental and survey research require this so researchers can devise instruments that track and measure the phenomenon. Qualitative research requires definitions, too, because they indicate entering beliefs about a phenomenon, beliefs that might meander and change as a result of the research process. More fundamentally, however, researchers need to clearly define phenomena so that researchers can discuss the phenomena with others.

One of the phenomena in education in most need of formal definitions is informal learning. Although people have a strong sense of what the term means on a visceral level, because informal learning is “the unofficial, unscheduled, impromptu way that people learn to do their jobs” (Cross, 2007), many workplace learning specialists have difficulty putting this concept into use their own words or, when they do, different workplace learning specialists either use different terms to mean the same thing or the same term to mean different things.

Consider the definitions of these terms: nonformal learning, incidental learning, self-directed learning, transfer of training, and the relatively new, ubiquitous learning.

All of these terms contrast with the term, formal learning. Formal learning typically refers to instructional programs in which the instructor or some similar “expert” sets the objectives, determines the requirements for successful completion (Driscoll & Carliner, 2005), and chooses the content taught, that occurs in a classroom or online setting specifically intended for instruction, and in which learning is a conscious goal of the activity.

Typically, formal learning refers to instruction that occurs face-to-face (such as in a classroom), synchronously online in a live virtual classroom (such as Adobe Connect or WebEx) (synchronous means that the instructor and learners are online at the same time), and asynchronously through online tutorials and workbooks (asynchronous means that the instructors and learners are not expected to interact directly with one another while learners take a course).

In many instances, formal learning also refers to a sequence of related learning events, such as degree, diploma programs, and certificate programs, which usually involve completing a prescribed selection of courses and meeting certain criteria of completion, such as passing an exam.

In contrast, the term informal learning—in contexts other than the workplace, like continuing education circles—actually refers to events that meet the definition of formal learning just provided. But the organizations that sponsor these events call them informal because learners participate in the events voluntarily with little or no intention of improving their employability.

Examples of this type of informal learning include classes offered in person and online by museums and community centers, or more formally structured programs like docent training programs offered by museums and historical sites. Because the learning objective, content, and
assessments are established by someone other than the learner, the content is somewhat abstract, instruction occurs in a location intended for learning, and students are most likely conscious that learning is occurring, such “informal learning” is actually formal under the definition provided here.

**Nonformal learning programs** refer to programs that have learning as a one of many primary outcomes or as a secondary outcome. Usually, nonformal learning programs are events, such as lectures, exercise classes, and demonstrations, whose goals are as much social and physical as they are intellectual. These events are often offered by community, cultural, religious, and sporting organizations, as well as some educational institutions but employers can also provide them.

Nonformal programs are often offered online. In some instances, like lectures made available through iTunes University and similar sources, the purpose of providing the materials is as much for archival purposes as for learning. In other instances, such as online documents made available through websites and online knowledge bases (that is, databases of informational content as well as online forums where users can discuss the information they find), people are as likely to use the content for a quick refresher on a fact they will forget as soon as they use that fact as they are to actually retain and build on the lessons learned. The knowledge base used by Karin in the example at the beginning of the chapter is an example of a nonformal program.

**Incidental learning** refers to knowledge and skills acquired unintentionally in situations not formally intended to provide instruction—that is, learning is an unanticipated incident. Examples of incidental learning include insights acquired through conversations with others while performing a job task, reading a policies and procedures guide or similar document, and through mentoring. Sometimes the learning experience is a positive one, but can also come through trial and painful error.

**Self-directed learning** is “any increase in knowledge, skill, accomplishment, or personal development that an individual selects and brings about by his or her own efforts using any method in any circumstances at any time” (Gibbons, 2002, p.2). In theory, learners embarking on a program of self-directed learning initiate, plan, and complete the program on their own (Gibbons 2008). In practice, learners work with an instructor or similar guide to plan the program of study, which is outlined in a learning contract that includes some form of acknowledgment for completing the program. Some people refer to this as intentional informal learning (Schulz & Rosznagel, 2010).

A typical self-directed learning program includes a variety of experiences, including reading primary sources like guides, policies instruction manuals, and articles from publications, participation in nonformal learning events like lectures (when available), discussions with people, and hands-on experiences.

Although the terms *informal learning* and **transfer of training** are not used synonymously (as are the other terms in this section), transfer of training represents one of the most common applications of informal learning in the workplace and, therefore, is included in this section.
Aguinis and Kraiger (2009) define transfer of training as “the extent to which new knowledge and skills learned during training are applied on the job” (p.461). As its name suggests, transfer of training occurs after a formal training event and, as research has shown, involves additional learning (Burke & Hutchins 2007, Broad & Newstrom 2001). When some authors on training complain that training does not work, their underlying concern is that learners do not apply the skills and knowledge taught in training on the job.

Researchers in human performance improvement and technology and related fields have extensively studied transfer of training and have concluded that the failure of training to transfer results from a number of issues, such as messages learned back on the job that conflict with those presented in training (like “that’s great that you learned such-and-such in your training class, but we don’t do things that way here”), a lack of resources to apply the training (such as learning how to use a new telephone system but not having access to the system for 6 or more weeks after the training event), and the quality and nature of feedback to workers about the way they perform the skills on the job. These contradictory messages, in turn, constitute a form of learning.

Transfer of training often involves a combination of formal and informal activities: formal ones like the availability of follow-up training if needed, and access to information and resources, and informal activities like opportunities to perform the skills in a real-world setting, receive feedback on this performance, and reflect privately and with others about what was learned, and the opportunity.

**Ubiquitous learning** is a relatively new addition to the domain of informal learning. According to Ogata and Yano (n.d.), ubiquitous learning refers to situations in which instructional materials are always available to students, who use the materials as the need arises. Because ubiquitous learning involves ready access to all types of instructional content, it typically involves the use of a mobile device, like a tablet computer (such as an iPad), MP3 player (such as an iPod) or smart phone (such as a Blackberry), although people might use these programs on a laptop computer. Because learners are surrounded by the learning experience and immersed in participating in it, they may or may not be aware that learning has occurred.

Within the context of the workplace, **informal learning** serves as an umbrella term that encompasses nearly all of these definitions. But as suggested in the definitions of these various terms, not all of the learning that’s informal is unofficial, unscheduled, or impromptu, as Cross (2007) characterizes it. Many of these forms share some characteristics of formal learning. Perhaps that’s because informal learning shares a relationship with formal learning, as Marsick (2009) notes: “Informal learning is always defined in contrast to formal learning. However, these studies confirm that informal and formal learning interacts in important ways,” (2009, p.273).

British researchers Colley, Hodkinson, and Malcolm, (2003) devised a definition of informal learning that takes this complex relationship of formal and informal into account. They liken informal learning to a control panel with four “levers” on it, each of which suggests a variety of levels of control over the learning process. Canadian researcher Wihak and her team (Wihak, Hall, Bratton, Warkentin, Wihak, & MacPherson, 2008) proposed a fifth “lever”.


These “levers” include:

- **Process**, which indicates who controls and assesses learning. In the most formal learning situation, an instructor controls learning by establishing the objectives and determining what constitutes successful completion of those objectives, such as passing a test. In the least formal learning situation, learners establish their own objectives and determine for themselves when they have successfully competed learning—whether or not that completion meets the same criteria as the instructor.

- **Location**, which considers where learning occurs. In the most formal situations, learning occurs in a setting intended for learning, such as a face-to-face classroom or virtual classroom. In the least formal situation, learning occurs organically, within the context of everyday life.

- **Purpose**, which considers whether learning is a primary or secondary goal of the activity in which learning occurred. In the most formal situations, learning is a (or the) primary objectives. In the least formal situations, learning is an accidental byproduct.

- **Content**, which considers whether the topic of study is abstract or technical, or related to a practical, everyday skill. In the most formal situations, content tends to be more abstract and can be applied in a broad range of contexts. In the least formal situations, content pertains to a specific job or task.

- **Consciousness**, which considers the extent to which learners are aware that learning occurred. In the most formal situations, people have a high level of awareness that learning occurred (or that it should have occurred). In the least formal situations, people may not even realize that they learned something until long after the experience.

When thinking about informal learning in the workplace, then, perhaps it is best to use that definition:

informal learning refers to situations in which some combination of the process, location, purpose, and content of instruction are determined by the worker, who may or may not be conscious that an instructional event occurred. Furthermore, the extent to which the worker determines the process, location, purpose, and content of instruction, and is aware that instruction occurred, can vary widely among situations that are labelled as “informal learning.”

Furthermore, given the variety of terminology surrounding informal learning and its overlapping and contradictory meanings, researchers must clearly define how they use the term and consistently use terms in that way.

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**References**


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