

# LET'S NAIL THE JELLY THAT IS INFORMAL AND FORMAL LEARNING

ALLISON ROSSETT

TWITTER: @AROSSETT  
HTTP://WWW.ALLISONROSSETT.COM

©2013 Allison Rossett



©2013 Allison Rossett

2

“Frozen yogurt  
tastes better than  
ice cream.”



©2013 Allison Rossett

3

“Compulsory physical  
exercise does no harm  
to the body,  
but compulsory learning  
never sticks to the mind.”

©2013 Allison Rossett

“I am convinced that  
the best learning  
takes place  
when the learner  
takes charge....”

©2013 Allison Rossett

5

“The only thing that  
interferes with my learning  
is my education.”

©2013 Allison Rossett

“Informal learning ... is becoming increasingly important as workers take responsibility for their own destinies.”

©2013 Allison Rossett

“Informal learning is a must in any training program.”

©2013 Allison Rossett

## Despite the words, not much, not yet

- Rossett & Marshall study, in T&D
  - discussion boards in higher education
  - Top *aspiration* is *personalized* learning
- Bozarth study for eLearning Guild
  - 83% recognized the value of social media for learning, but only 36% reported that they were employing it.

©2013 Allison Rossett

9

## Today, mostly

Experts define  
We deliver  
We seek certainty that  
our people have acquired sk/k  
Scheduled events,  
AKA courses, dominate

©2013 Allison Rossett

10

## Passion for informal learning vs. what's really going on....



©2013 Allison Rossett

11

## What we did

- We built a tool with 15 questions and 2 tables for strategies associated with informal and formal learning
- We piloted and revised
- We wrote an article and posted a tool that went live in *T&D* in JAN 2012
- We offered sessions (today!)

©2013 Allison Rossett

12

- Today...

- ❖ How we think about formal/informal learning
- ❖ Meet the YinYang tool...and Orville
- ❖ Hear how the USCG used the tool to think hard about their approaches
- ❖ Hear how American Express used the tool to think hard about their approaches
- ❖ Give the tool a test drive....
- ❖ Not too much, not too little, but just right—for you and your organization

©2013 Allison Rossett

13

*Individual*  
makes great good sense.  
But when we talk  
about the *enterprise*....



©2013 Allison Rossett

14



**Informal cheese maker**



**Formal oil driller**

©2013 Allison Rossett

15

**Is success defined?**

**Defined?**

**Who chooses ends & means?**

**Decider?**

**Must competence be proved?**

**Proof?**

©2012 Allison Rossett





[Thanks to Carl Czech for the photo depicting law enforcement training in Helmand Province, Afghanistan.]

©2012 Allison Rossett

17

- Today...

- ❖ How we think about formal/informal learning

- ➡ ❖ Meet the YinYang tool...and Orville

- ❖ Hear how the USCG used the tool to think hard about their approaches

- ❖ Hear how American Express used the tool to think hard about their approaches

- ❖ Give the tool a test drive....

- ❖ Not too much, not too little, but just right—  
for you and your organization

©2013 Allison Rossett

18

## Meet Orville, an experienced workplace learning leader



“I resonate to all things informal, but it has to work for us. Also, I’m not sure what strategies would make our programs more informal.”

19

## Orville’s work

- We sell high end accessories in North America and Europe.
- We put instructors on the road to train our people about our products, style, colors, life style, culture, and sales skills.

20

# Orville reaches for the YinYang tool



<http://yinyang.frankn.net>

## Performance support for formal and informal learning

Would more informality serve your organization and people? Might more formality add to your efforts? For your organization - and a particular initiative or project - in mind.

- More informal
- More formal
- Not inclined either way

What is your organization interested in? Are there current efforts to become more formal or informal?

1. We have defined what we want our people to know and do
2. We're committed to our people coming to their own conclusions about what and how they learn
3. We can trust that our people will learn on their own to competently perform their jobs
4. We must prove that our people can do it before we release them to do the work
5. Our people must be fluent at the work, doing things quickly and accurately
6. Our people are skilled knowledge workers who handle the unpredictable and various, making it hard to specify all they need to know to succeed
7. We want our people to use their wits and figure things out for themselves
8. It can be dangerous or costly if our people attempt to do the work before they are prepared
9. Our people want to know this and tend to seek lessons and information on their own
10. Our people can be resistant or disinterested and tend not to study on their own
11. We value and measure individual progress, then tailor individual paths to growth

- That's us
- Sometimes
- Not us

21

1. We have defined what we want our people to know and do

2. We're committed to our people coming to their own conclusions about what and how they learn

3. We can trust that our people will learn on their own to competently perform their jobs

4. We must prove that our people can do it before we release them to do the work

5. Our people must be fluent at the work, doing things quickly and accurately

6. Our people are skilled knowledge workers who handle the unpredictable and various, making it hard to specify all they need to know to succeed

7. We want our people to use their wits and figure things out for themselves

8. It can be dangerous or costly if our people attempt to do the work before they are prepared

9. Our people want to know this and tend to seek lessons and information on their own

10. Our people can be resistant or disinterested and tend not to study on their own

11. We value and measure individual progress, then tailor individual paths to growth

12. We must prove to regulators that our people know this

13. We want them to lean on each other and to develop shared resources and communities across the organization

14. We must authenticate messages and lessons with experts, compliance or legal teams


15. The important thing is that they work together and establish relationships and collaboration habits

Submit

# Will informal learning work for Orville and his organization?

©2012 Allison Rossett

23



Give them more choices about what they learn and how they learn it

Provide them with access to a wide variety of resources that they can browse, select, use, adapt

Create ways for them to themselves add to the resources

Help learners identify and connect with peers and distant experts who possess know-how

Encourage communities, online and in person, to encourage discussion and collegiality

Provide ways for them to compare and discuss their efforts and knowledge to others

Define success as interest, effort, contribution, conversation, appreciation and inquiry

Prepare line leadership for learning characterized by authentic, lively experiences more than established outcomes

Encourage the conversations that turn false starts and mistakes into learning

Support unexpected benefits that come through debate, experimentation and trial by error

- Encourage the conversations that turn false starts and mistakes into learning
- Support unexpected benefits that come through debate, experimentation and trial by error
- Adjust to accept reduced enterprise control and to tolerate not being certain what they are learning, sometimes if they are learning at all

24

- Today...

- ❖ How we think about formal/informal learning

- ❖ Meet the YinYang tool...and Orville

- ➡ ❖ Hear how the USCG used the tool to think hard about their approaches

- ❖ Hear how American Express used the tool to think hard about their approaches

- ❖ Give the tool a test drive....

- ❖ Not too much, not too little, but just right—for you and your organization

©2013 Allison Rossett

25

## **RDML Stephen Mehling, leader of Coast Guard's Force Readiness Command**



Force Readiness Command includes:

- Training
- Tactics, Techniques and Procedures
- Assessment

Today, the Coast Guard offers a very formal training program

Do advances in technology make informal the way of the future for the Coast Guard?

©2013 Allison Rossett

26

# The new 45' boat ....



- This great new high tech boat has not been used by our people in heavy weather before— and winter is coming. How do we prepare coxswains accustomed to operating in 8 foot seas to be proficient and safe at 12 feet?
- Some said we need consistent, formal training. Others reminded us that these people know their roles and can figure it out themselves, helping each other.
- We turned to Allison and Frank’s YinYang tool.

©2013 Allison Rossett

27

# Let’s look at heavy weather small boat operators (coxswains)....

Performance support for formal and informal learning

*Would more informally serve your organization and people? Might more formality add to your efforts? Focus on your enterp organization - and a particular initiative or project - in mind.*

What is your organization interested in? Are there current efforts to become more formal or informal?

1. We have defined what we want our people to know and do
2. We’re committed to our people coming to their own conclusions about what and how they learn
3. We can trust that our people will learn on their own to competently perform their jobs
4. We must prove that our people can do it before we release them to do the work
5. Our people must be fluent at the work, doing things quickly and accurately



## 5. Our people must be fluent at the work, doing things quickly and accurately

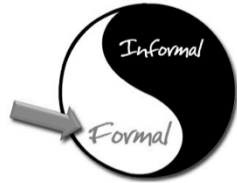
- |  |              |
|--|--------------|
| 8. It can be dangerous or costly if our people attempt to do the work before they are prepared                 | That's us! ▾ |
| 9. Our people want to know this and tend to seek lessons and information on their own                          | Sometimes ▾  |
| 10. Our people can be resistant or disinterested and tend not to study on their own                            | Sometimes ▾  |
| 11. We value and measure individual progress, then tailor individual paths to growth                           | Sometimes ▾  |
| 12. We must prove to regulators that our people know this  | That's us! ▾ |
| 13. We want them to lean on each other and to develop shared resources and communities across the organization | Sometimes ▾  |

## 8. It can be dangerous or costly if our people attempt to do the work before they are prepared

©2012 Allison Rossett

28

# Yin or Yang for the new 45' boat?



Here are ways to add YANG to your efforts:

- Measure if they have learned what they are supposed to learn
- Measure the efficiency and efficacy of learning programs
- Proliferate institutional knowledge through the coordination and delivery of physical and virtual learning events
- Drive learners to a central repository, such as an LMS, for access to institutional wisdom, including outcomes, curricula, learning events and self-paced resources
- Schedule events that spread authenticated messages

1 Define what it is that great performers know and do and seek to spread those competences, habits and perspectives

2 Stress the importance of correct performance and the high cost and impact of errors

- Align employees to the use of standard procedures, content and processes
- Align supervisors as teachers and mentors, playing their part in advancing key organizational messages
- Facilitate, monitor and moderate exchanges of information through communities, online or in person

©2013 Allison Rossett

29

The first ever exportable *formal* RB-M Heavy Weather Coxswain course was delivered in December



©2012 Allison Rossett

“In most of our jobs and situations formality seems to be the way to go and the Yin Yang tool confirms this. Even if we have to fast track the development of training, as we did with the 45' boat, when lives are at stake, we rely on the formal, on standard and specified outcomes and expectations.”

30

- Today...

- ❖ How we think about formal/informal learning
- ❖ Meet the YinYang tool...and Orville
- ❖ Hear how the USCG used the tool to think hard about their approaches
- ➡ ❖ Hear how American Express used the tool to think hard about their approaches
- ❖ Give the tool a test drive....
- ❖ Not too much, not too little, but just right—for you and your organization

©2013 Allison Rossett

31

## Meet Samantha, a learning leader for American Express



“I work in an intensely regulated and competitive world. Sarbanes-Oxley and now Dodd-Frank.... While I am inclined towards the informal, we can’t just jump into it because I like it.”

©2013 Allison Rossett

32



1. We have defined what we want our people to know and do

2. We're committed to our people coming to their own conclusions about what and how they learn

3. We can trust that our people will learn on their own to competently perform their jobs

4. We must prove that our people can do it before we release them to do the work

5. Our people must be fluent at the work, doing things quickly and accurately

6. Our people are skilled knowledge workers who handle the unpredictable and various, making it hard to specify all they need to know to succeed

7. We want our people to use their wits and figure things out for themselves

8. It can be dangerous or costly if our people attempt to do the work before they are prepared

9. Our people want to know this and tend to seek lessons and information on their own

10. Our people can be resistant or disinterested and tend not to study on their own

11. We value and measure individual progress, then tailor individual paths to growth

12. We must prove to regulators that our people know this

13. We want them to lean on each other and to develop shared resources and communities across the organization

14. We must authenticate messages and lessons with experts, compliance or legal teams

15. The important thing is that they work together and establish relationships and collaboration habits

Submit

**1. We have defined what we want our people to know and do**

**6. Our people are skilled knowledge workers who handle the unpredictable and various, making it hard to specify all they need to know to succeed**

Sam's audience varies widely from hourly customer service reps to managers to executives. It's difficult for Sam to create formal training that is relevant to such a broad range of job roles. She'd much prefer to provide resources that can be personalized, self-selected, but...

1. We have defined what we want our people to know and do

2. We're committed to our people coming to their own conclusions about what and how they learn

3. We can trust that our people will learn on their own to competently perform their jobs

4. We must prove our people can do it before we release them to do the work

5. Our people must be fluent at the work, doing things quickly and accurately

6. Our people are skilled knowledge workers who handle the unpredictable and various, making it hard to specify all they need to know to succeed

7. We want our people to use their wits and figure things out for themselves

8. It can be dangerous or costly if our people attempt to do the work before they are prepared

9. Our people want to know this and tend to seek lessons and information on their own

10. Our people can be resistant or disinterested and tend not to study on their own

11. We value and measure individual progress, then tailor individual paths to growth

12. We must prove to regulators that our people know this

13. We want them to lean on each other and to develop shared resources and communities across the organization

14. We must authenticate messages and lessons with experts, compliance, legal

15. The important thing is that they work together and establish relationships and collaboration habits

Submit

**4. We must prove our people can do it before we release them to do the work**

**12. We must prove to regulators that our people know this**

**14. We must authenticate messages and lessons with experts, compliance, legal**

Despite her desire to move towards the informal and allow employees to be more self-directed, the demands of governmental regulations constraint what Sam can do

“I’m caught in the middle of a fork in the road. I want to create an informal culture, but regulators want us to be more formal. Can we create an informal culture with the rigor of formality behind the scenes? It would be ideal for people to find, search and seek out the learning versus us having to spoon feed them, but it’s not pragmatic.”

©2012 Allison Rossett

35

## **Integrate global perspectives into the university curriculum**

A liberal arts university sends the majority of its students to study across the world.

But not much has changed on campus. The President commits resources to encourage faculty to redesign courses. His Dean prefers an informal approach to global course redesign and enrichment.



©2013 Allison Rossett

36

**Is success defined?**

Defined?

**Who chooses ends & means?**

Decider?

**Must competence be proved?**

Proof?

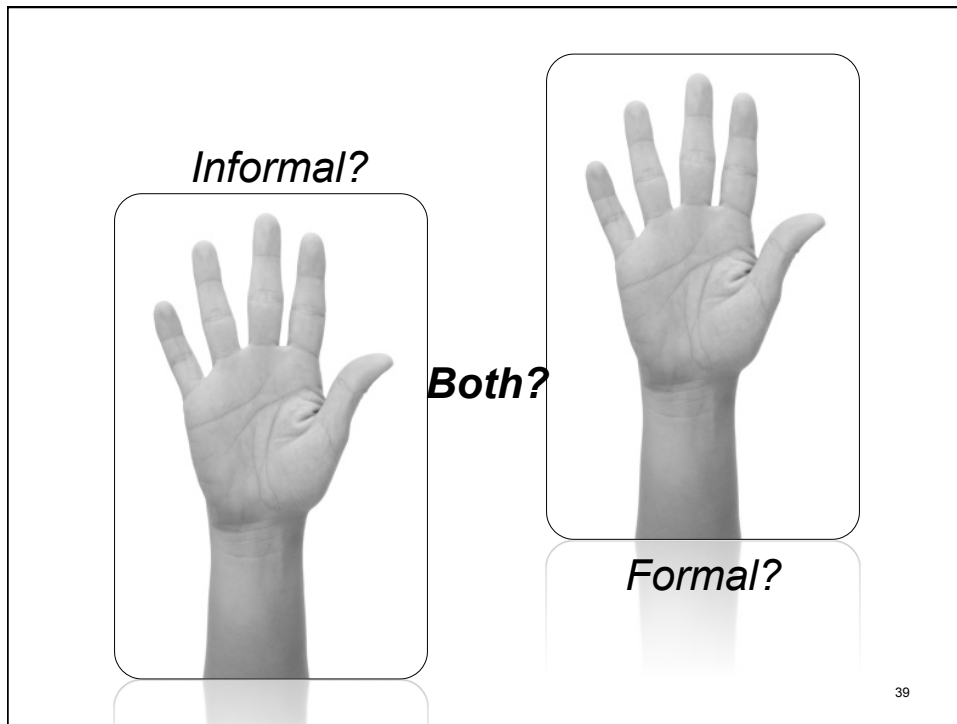
©2012 Allison Rossett

**Try the tool, think about it**



<http://yinyang.frankn.net>

38



© frankn.net/yinyang/

**YinYang**  
of formal and informal learning

That's us  
 Sometimes  
 Not us

**1. We have defined what we want our people to know and do**

It is your organization interested in? Are there current efforts to become more  
e have defined what we want our people to know and do  
e're committed to our people coming to their own conclusions about what an

**3. Our people want to know this and tend to seek lessons and information on their own**

ur people must be fluent at the work, doing things quickly and accurately  
ur people are skilled knowledge workers who handle the unpredictable and ve  
e want our people to use their wits and figure things out for themselves

That's us  
 Sometimes  
 Not us


**We must prove that our people can do it before we release them to do the work**

©2013 Allison Rossett

40

**YinYang**  
of formal and informal learning

Your responses do not indicate a shift towards informal or formal learning



Select from both lists

©2012 Allison Rossett 41

- 1 Proliferate institutional knowledge through the coordination and delivery of physical and virtual learning events
- 1 Drive learners to a central repository, such as an LMS, for access to institutional wisdom, including outcomes, curricula, le
- 1 Schedule events that spread authenticated messages
- 1 Require the use of centrally managed content for on-the-job learning and support
- 1 Define what it is that great performers know and do and seek to spread those competences, habits and perspectives
- 1 Assess the individual on required competencies and define sequential paths to mastery
- 1 Stress the importance of correct performance and the high cost and impact of errors
- 1 Demonstrate to line leadership how learning and development efforts provide value to the organization
- 1 Align employees to the use of standard procedures, content and processes
- 1 Align supervisors as teachers and mentors, playing their part in advancing key organizational messages
- 1 Facilitate, monitor and moderate exchanges of information through communities, online or in person

**YANG strategies**

©2012 Allison Rossett 42

are ways to add YIN to your efforts:

**YIN  
strategies**

- Give them more choices about what they learn and how they learn it
- Provide them with access to a wide variety of resources that they can browse, select, use, adapt
- Create ways for them to themselves add to the resources
- Help learners identify and connect with peers and distant experts who possess know-how
- Encourage communities, online and in person, to encourage discussion and collegiality
- Provide ways for them to compare and discuss their efforts and knowledge to others
- Define success as interest, effort, contribution, conversation, appreciation and inquiry
- Prepare line leadership for learning characterized by authentic, lively experiences more than established
- Encourage the conversations that turn false starts and mistakes into learning
- Support unexpected benefits that come through debate, experimentation and trial by error
- Must to accept reduced enterprise control and to tolerate not being certain what they are learning, some

©2013 Allison Rossett 43

- Today...
  - ❖ How we think about formal/informal learning
  - ❖ Meet the YinYang tool...and Orville
  - ❖ Hear how the USCG used the tool to think hard about their approaches
  - ❖ Hear how American Express used the tool to think hard about their approaches
  - ❖ Give the tool a test drive....
  - ➡ ❖ Not too much, not too little, but just right— for you and your organization

©2013 Allison Rossett 44

Learning, information & support  
available on demand, at work  
Continuous conversations &  
vibrant, generous communities  
Personalized learning programs,  
with vivid practices and feedback



©2013 Allison Rossett

45



The YingYang tool is free.

- Try it on your projects
- Use it to structure conversations with managers, peers and customers
- Discuss the strategy options in the tables

Performance support for formal and informal learning

*Would more informality serve your organization and people? Might more formality add your organization - and a particular initiative or project - in mind.*

What is your organization interested in? Are there current efforts to become more form

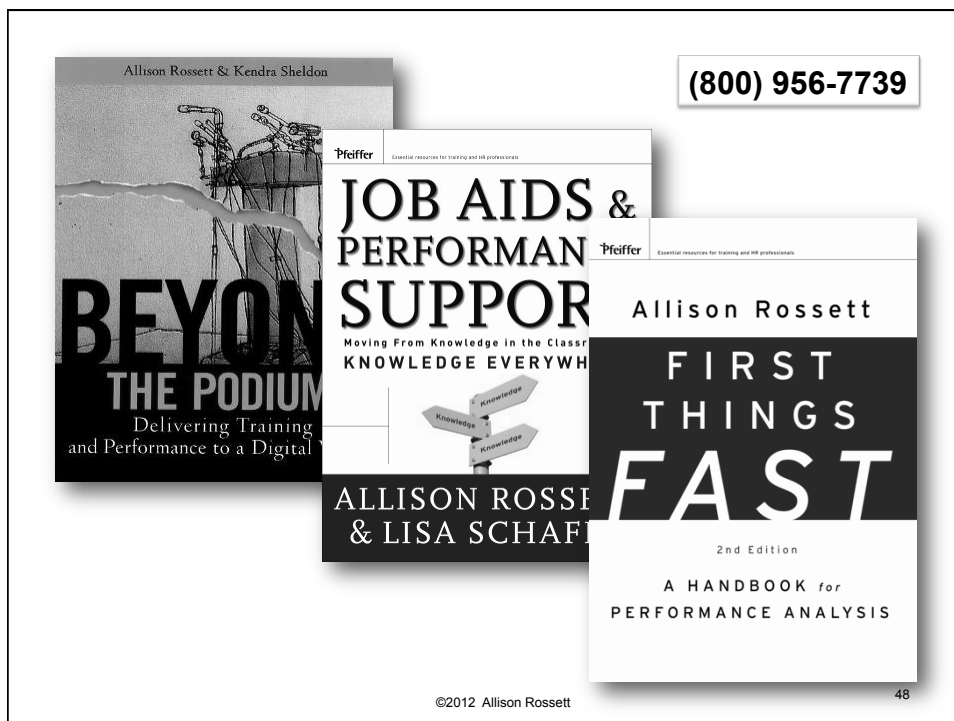
1. We have defined what we want our people to know and do
2. We're committed to our people coming to their own conclusions about what and how
3. We can trust that our people will learn on their own to competently perform their jobs
4. We must prove that our people can do it before we release them to do the work
5. Our people must be fluent at the work, doing things quickly and accurately
6. Our people are skilled knowledge workers who handle the unpredictable and various
7. We want our people to use their wits and figure things out for themselves
8. It can be dangerous or costly if our people attempt to do the work before they are pre

©2013 Allison Rossett

46

Resources	URL
Allison Rossett & Antonia Chan's white paper about engagement in elearning	<a href="http://www.adobe.com/resources/elearning/pdfs/95010205_elearningengage_wp_ue.pdf">http://www.adobe.com/resources/elearning/pdfs/95010205_elearningengage_wp_ue.pdf</a>
First Things Fast, tool and 2 <sup>nd</sup> edition of the book	<a href="http://www.josseybass.com/legacy/rossett/rossett.html">http://www.josseybass.com/legacy/rossett/rossett.html</a>
Allison Rossett's book about job aids and performance support	<a href="http://www.colletandschafer.com/perfsupp/index.html">http://www.colletandschafer.com/perfsupp/index.html</a>
Bob Mosher and Con Gottfredson on performance support	<a href="http://www.learningguidesolutions.com/index.php/usa/news/mosherbook/">http://www.learningguidesolutions.com/index.php/usa/news/mosherbook/</a>
Informal learning resources: Jay Cross	<a href="http://internettime.pbworks.com/w/page/20095906/research">http://internettime.pbworks.com/w/page/20095906/research</a>
Frank Nguyen's chapter on adapting instructional design to a Web 2.0 world	<a href="http://frankn.net/publications/Allen2012-Design2.pdf">http://frankn.net/publications/Allen2012-Design2.pdf</a>
Grant Ricketts on formal and informal learning	<a href="http://www.razorlearning.com/blog/2010/08/formal-informal-learning-practical-taxonomy-learning-learning-leaders/">http://www.razorlearning.com/blog/2010/08/formal-informal-learning-practical-taxonomy-learning-learning-leaders/</a>

©2012 Allison Rossett 47







Dr. Allison Rossett, long time professor of Professor of Educational Technology at San Diego State University, is in the Training magazine Hall of Fame, CLO Advisory Board, and Elearning Guild's Board. Rossett, who served on the international Board for ASTD, has authored six books, including a new edition of her classic, *First Things Fast: a handbook for performance analysis*. Allison writes about and consults on instructional design, metrics, and technology-based learning.

Twitter: @arossett

E-mail: [arossett@cox.net](mailto:arossett@cox.net)

Site: <http://www.allisonrossett.com>

**And thanks to you for joining me today!**

49

©2012 Allison Rossett