



The Synergy of Formal and Informal Training in the Workplace

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Introduction

Palliser Furniture Ltd. is the largest furniture manufacturer in Canada with its head office in Winnipeg, Manitoba. The company has evolved from a one man operation starting with Mr. A DeFehr Sr. to an international company with employees in Canada, USA, Mexico and Indonesia totaling over 1,200 workers. As with many manufacturers in today's global economy increased competition has required Palliser to continually update production, distribution and quality of our product. Our employees, particularly entry level supervisors have had to adapt quickly to changes in product specifications and be responsible to train members of their teams to implement the changes. This company and the worker partnership in learning became the gold standard at Palliser. The workplace programs this study will focus on are Basic Computer Skills, Manufacturing and Leadership, and high school upgrading in English and Math. The learners and instructors interviewed presented their opinions and experiences which informed the data analysis and help identify the formal and informal learning paths of the workers.

The learning trend at Palliser

Our rapid growth in the late 90's and early 2000 began to influence the general learning trend of sharing product information between Canada and Mexico using computers. While the digital laser cutting operators received very specific and formal training, other Palliser employees began to realize that having a division in Mexico meant we would need to change our communication and management styles. Team leaders had to manage a greater volume of production and their employees began to understand that the more they could produce the higher their gain share would be. This motivation to maximize gain share translated into some employees wanting to have more flexibility in determining the style and number of pieces they could produce in a day. One way to increase their production was to have the ability to navigate work orders on the computer. Checking quality standards, inventory, and shipping dates would all assist in the employee having greater responsibility in their daily assignments.

These supervisors or Team Leaders as they are referred to at Palliser are responsible for ensur-



ing strict adherence to quality standards, production timelines, as well as health and safety/WHMIS education. Therefore, our education and training program at Palliser focuses on numeracy, document specification reading, accurate reporting on inventory, and team management skills. This case study will present data from employees who have participated in both formal and informal activities. It will also document the trends and events both internal and external to the company that are seen as triggers to motivate workers in their learning pathways.

This organizational learning trend began to emerge as employees realized that without basic computer skills they were more reliant on their team leader to assign work. As more employees became aware of the benefits of being self directed they also began to ask about general computer training. Our “Basic Computer Skills” program started in 2000 and was open to all factory employees. The format for the class was based on a partnership which required input from each of the stakeholders: Palliser, employees and government funders.

Factors related to training and learning

Manufacturing, in general, must continue to incorporate new types of learning in their production functions. In 1998 Palliser expanded into Mexico. Many non-skilled or limited-skill jobs were transferred to Mexico while Palliser Winnipeg invested in highly technical machines that required computer

skills, numeracy and accurate recording of inventory stock. The “human tech” is an example of the type of machinery new to our workplace that required formal training. This machine uses a computer and digital laser to cut leather. As leather is a natural material the human tech operators also need to invest in critical judgment of each leather hide to assess features and flaws that would affect how the piece was cut and on which area of the sofa or love seat it would be sewn. The introduction of this type of machinery, while being used by only a small percent of all leather cutters clearly signaled that technical innovations would continue more rapidly in manufacturing and that employees would need to upgrade and cross train in a now internationally competitive market.

As our divisions in Mexico were taking a greater share of the manual cutting, workers in our Winnipeg divisions felt they needed to upgrade their technical skill base using computers. Although the divisions in Mexico are still part of Palliser Furniture Ltd. many employees seemed to feel that Mexico was part of the external global market. One instructor mentioned that some Winnipeg workers feel frustrated when they need to communicate either by phone or email with the employees in Mexico. However, if the employees in Winnipeg and Mexico can navigate the Palliser Intranet they can both open the same “Standard Operating Procedure” document and diagrams as they discuss the production order. Our workers in Winnipeg have become very proactive in this type of learning on the Palliser Intranet and have demonstrated an increased ability to help train their counterparts in Mexico within a



specific function. This area has proven to be a focal point for both formal and informal training.

Learning triggers

One of the triggers that set the learning path for workers was related to the positive exchanges that took place beforehand in the more formal training classrooms. One very noticeable result was the success and confidence the employees in the Manufacturing and Leadership class began to demonstrate with other workers. After a training session, one employee remarked,

“...some people don’t like change but now I can look at my co-workers and see them as individuals and help them deal with different situations.”

Based on the data, one main theme that emerged was that a worker’s learning path is predicated on the teaching philosophy that adults need to learn in an environment that recognizes their prior learning both formal and informal, and that a relationship of trust and respect be established. During the initial promotion of these programs many employees expressed doubt that the classes would be beneficial or enjoyable. Once the programs started these same workers began to share with their instructor and other co-workers that the training was helpful. When asked what were some of the benefits they got from participating in the formal training, workers agreed that their organizational skills had greatly improved. Large binders with paper copies were transferred to a

Word or Excel program and less time was needed to retrieve information.

Surveys from the program coordinator confirmed that learners and their supervisors also saw increases in motivation from the workers. One instructor described the learners as

“an incredibly energized group. They work all day in fairly physically demanding jobs and then come to my class for 2 hours and tell me how lucky they are to be here. If they seemed to lack confidence in the first class, by the 2nd and 3rd class they’re asking for homework and helping each other in class.”

It was noted that workers involved in the classes could now assist others back on the shop floor. In terms of informal learning one supervisor stated “he’s more willing to help if someone is having a problem on the job”. Workers involved in training can more quickly assess and assist others. Confidence seems to be a natural by product of the training. One worker believed that he is more objective and doesn’t feel he will be blamed if he offers to help a co-worker with a production problem.

One supervisor observed that the same worker seemed “more focused and had a better attitude”. Workplace training, both formal and informal, has now been recognized as a valid means to more fully engage employees in a company culture of learning. Another learning trigger that emerged from the data was the workers’ desire to keep a breast of the safety concerns on the plant floor. Our Health and Safety Department has been focusing more attention on safe operating procedures. Safety



guards on new machinery, hazardous material handling and safety protection equipment were all reinforced in a major awareness campaign launched recently. Many of the workers involved in the classroom training volunteered to be on the Health and Safety Committees and helped ensure compliance within their teams. This was another focal point for much informal training.

Making decisions about workplace learning

Employees who demonstrate good work habits generally bring these same characteristics into the classroom. Yet many workers were unable to take the first necessary step to be involved in training at the workplace. It seems that word of mouth was the best way to explain to other workers that both formal and informal training can provide the necessary supports to enhance success. Other variables such as shift times, car pooling, and bus schedules were also considered and discussed with employees in order to encourage their attendance in the classroom training. One instructor identified the need for a flexible and respectful working environment.

“The instructor must always be mindful that adult learners need a variety of academic and personal supports to succeed. Resource material must be adapted to fit the learners’ previous knowledge and skill base. Coaching from the instructor and peers during the entire process of assessment, instruction, monitoring and evaluation should reflect well defined objectives and outcomes in either formal or informal training.”

Recognizing the training path

While a high school diploma is not required for most entry level jobs at Palliser, employees wanting to get ahead recognized they needed to upgrade their skills. The significant growth at Palliser mentioned earlier necessitated an increase in our pool of potential team leaders. The first formal training program which combined supervisory skills and computer training was called Manufacturing and Leadership. The learners that were recommended for this training were not all enthusiastic about attending. Many participants shared during the assessment and interview process that they were afraid that their lack of education would be evident and that the company might realize they weren’t ‘Team Leader material’. However, once the classes began each participant rated the class, instructor and materials as very good or excellent. This type of training also strengthens the need for informal learning as documented by our workplace instructor. For example, workers used new negotiation skills with their supervisors when overtime or shift scheduling would interfere with their class attendance. Prior to their participation in training, workers felt they didn’t have the communication skills that would result in a positive interaction with their supervisor. However, one worker stated that he was more effective in interpersonal situations and used the same techniques at home with his family. Another learning outcome of the program was that workers began to seek out further training. Based on the evaluation after the Manufacturing and Leadership program ended, several participants and other workers became interested in having an on site



high school diploma program offered at the workplace.

Opportunities for learning and engagement in the company

The process of learning takes many paths and the workplace can enhance these opportunities. As the skills in problem solving, numeracy, inventory management and general literacy improvement began to be transferred into higher production and better job satisfaction for the learners, other employees came forward to ask for upgrading or specific training. Worker responses from the ELLI survey support this interest in wanting more continuous learning. While respondents indicated a variety of learning styles they all agreed that a relationship of trust and support with the instructor and company were key to any learning experience. One learner exemplified an approach to continuous learning in this way:

“as a kid I was always curious but didn’t really like to sit still in school. I was labeled a bit of a trouble maker so I dropped out after grade 10. After a couple of years in different jobs I signed up for a computer class at work. The teacher was great and it gave me a lot of confidence, so I signed for other classes when they were offered at work. I’ve been promoted twice since that first class.”

Good relations between workers and company that acknowledge and reward learning in the workplace help retain good employees and at the same time prepare them to respond to the rapid changes in the manufacturing industry.

Workers also transfer learning in different areas of the workplace to help create a more productive work environment. One employee was able to show a co-worker how to archive e-mail and create folders. This new type of coaching between workers helped open more opportunities for learning and engagement in the day-to-day operations of the company. In some cases, the learning opportunity contributes to the worker’s decision to leave the company for a better job in a different company. It should, however, still be seen as a societal benefit as one learner summed up “I feel good about myself and my family is proud of me for going back to school. It’s easier to help my kids with their homework now.”

Types of informal learning

Most shop floor workers rely on informal learning as they are performing their manual and technical job tasks. These job responsibilities generally require a learn by observing approach to training. The workers’ journals expressed many of these patterns that enabled them to be more effective on the job. For example, some workers said that they were aware of an increased ability to mentally organize information when demonstrating a task to another worker. Other types of informal learning documented in the workers’ journals include: a willingness to participate in meetings or join a committee and an interest in engaging in focused workplace conversations with other employees. The workers’ journals also revealed that informal learning helped them more clearly communicate about their job responsibilities and tasks. One learner wrote,



“I don’t take it personally when something goes wrong on the equipment. I know I’m doing my job right and can tell the supervisor that.”

Workers’ interviewed also spoke about their emerging negotiating skills. One worker shared her experience about how she arranged to fill in for other employees while they were on vacation. Practicing these new skills which she learned through other workers has gained her a good reputation as a problem solver with her supervisors and co-workers.

Synergy between formal and informal learning

The workers and instructors that participated in this case study believe that there is a synergy between formal and informal learning. Learning whether it is intended or consequen-

tial occurs frequently in our work lives. What makes the learning experience positive is the willingness by both learner and instructor, or between co-workers to treat each other with respect and be engaged in the process. As one learner stated,

“I like it when I can tell the teacher I don’t understand and then they try to tell me in a different way. I think it’s important to always try again and not give up.”

Learning also continues without an instructor as many workers have demonstrated in developing their own training path. Increased awareness of self directed learning strategies has made a significant impact on the workers that participated in this study. They have identified learning triggers and made decisions about developing a training path. All of these steps have improved production efficiency as well as safety and communication skills both in the workplace and in their personal lives.