

Learning Solutions: Selecting learning formality and delivery modes

Once you know what learning needs must be addressed, the next step in planning is to make a decision about the level of formality for the learning and delivery modes you will apply. You should resist the temptation to jump to a quick solution, and instead examine your needs and constraints to come up with the best choices possible. This resource can guide you in the process.

Learning Solutions is a broader term we can use here to describe combination of decisions about how the training will take place. This begins with the level of learning formality (formal, semi-formal, and informal) while Delivery Modes is used to describe the setting (e.g., online learning or classroom) and the logistical structures in which people learn (e.g., a course, self-directed study, on-the-job mentoring or coaching).

A final set of decisions, the choice of Learning Strategies, completes the makeup of the Learning Solution. This choice is discussed in another resource.

What do we mean by Learning Solutions?

Professionals learn their skills in a wide variety of ways, including:

- taking courses in classrooms and online
- accessing information and learning resources to study on their own
- working in teams with more experienced professionals
- working directly with an assigned coach or mentor
- sharing experiences in work processes and job challenges with their colleagues to get new ideas
- simply doing their jobs and trying to improve the outcomes of their work

In fact, professionals learn in all these ways, and trainers should not overlook the varieties of opportunities to learn. Learning Solutions is a term we use in these resources and in WMO-No. 1114 to describe the combination of decisions about the broad structures of learning. These begin with choosing the formality of learning (formal, semi-formal, and informal). Delivery Modes is used to describe the setting (e.g., online learning or classroom) and the logistical structures in which people learn (e.g., a course, self-directed study, on-the-job mentoring or coaching). A final set of decisions regarding the Learning Strategies, or methods of organizing learning activities, completes this set of decisions that here we call the Learning Solution. Making these choices, including how to blend the choices, requires that we consider logistical constraints, pedagogical needs, and audience requirements.

While that sounds complicated (and at times it **can** be complicated), it is not that different from other decisions we make in our daily lives. For example, imagine making a decision about finding a “new place to live.” Now, we could have said “finding a house,” but that pre-supposes that I need house. Maybe I would benefit more from something that is not a house, especially a new house – an apartment, for example, or a mobile home, or maybe even a boat. My circumstances (space required, budget, length of time needed, etc.) and preferences will play a big part in my choice. It is important not to jump to a single conclusion without consider a variety of criteria and a variety of options that might meet them.

Finding the best learning solutions is similar. We examine needs, constraints, and preferences and narrow down our choices before deciding. Sometimes we are told to plan “a one-week course with x number of topic experts” before any other options are considered. But maybe a course is not the only option, and not even the best option. This is a very common practice—to identify a learning need (or just assume a learning need) and then immediately start planning a course by writing down a list of trainers who can participate. This approach misses out on many of the choices available to us as trainers and might ignore helpful ways of meeting the learning needs. It is

understandable why this happens—a course is a very familiar approach, and easier and quicker to plan. Sometimes we even assume a course filled with lectures rather than considering other learning activities—which is the topic of a later step in the planning process. A course with lectures is a comfortable choice, but often not the best choice.

Levels of Formality

As discussed in WMO-No. 1114, “Guidelines for Trainers,” it can be useful to view three broad categories of formality: formal learning, semi-formal learning, and informal learning. This is likely the first decision that you will make but remember that you can also combine them.

1. **Formal learning** includes those solutions that include a defined role of teacher or trainer, have specified learning outcomes to be achieved, and usually include some form of assessment or certification of achievement. Formal learning can happen in the classroom or online, or even on-the-job when it involves a well-designed programme.
2. **Semi-formal** learning includes those solutions that are more individualized, and therefore have fewer specified learning outcomes. The goal is improvement on-the-job, and the trainer (or coach or colleague) provides more guidance and feedback than direct instruction. Two common forms of semi-formal learning solutions are coaching and mentoring. It may include only indirect assessment or general feedback.
3. **Informal learning** solutions take on many forms, and include those solutions that offer opportunities for improvement but do not include defined roles for trainers or teachers. These can include self-study, learning from peers, and learning from job experience. Informal learning is usually less defined in terms of a start and stop date. It may or may not include assessment.

The choice of learning formality depends on a variety of factors, including the current level of skill, how fast skills must be or can be learned, how formal the assessment must be, and the complexity of the skills to be learned. It can be important to include an informal learning component as a part of any learning process, especially in complex professional disciplines.

Delivery Modes: The Learning Environment

Delivery Modes is used here to describe the setting (e.g., online learning or classroom) and the logistical structures in which people learn (e.g., a course, self-directed study, on-the-job mentoring or coaching). It might also be called the learning environment, because while training is delivered, learning itself is never delivered, but experienced.

The three most common categories of delivery modes are described below:

1. **Classroom learning** (also called face-to-face or presential learning) Using a classroom is a very popular logistical solution not just due to its long history, but because it brings learners with common needs and goals together with a teacher or teachers prepared to help them. It began when books were scarce, and because it allowed a teacher to read from them to their students (to lecture). Today the use of the classroom is much more varied, allowing many types of discussions, guided exercises, a practical learning approaches like case studies and simulations.
2. **Online learning** Online learning takes many forms, just like classroom learning. In fact, it can be even more flexible due to fewer constraints on time. It can also be much lower in delivery costs because travel is not required, but it usually requires more effort to develop

(See the resource Distance Learning for Decision Makers). Below are some variations it might take:

- **Formality:** For-credit courses, continuing education, open courses, informal learning and mentoring, social media platforms for communities of practice
 - **Synchronicity:** Live, time-bounded, self-directed, on-demand, blends of these
 - **Learning outcomes:** Background knowledge, basic skills, high-level performance and decision-making
 - **Technology utilization:** Files, media, recorded lectures, webinars, collaboration tools, social media, course management tools, mobile learning
 - **Teacher roles:** Teacher-led, teacher-guided, self-directed
 - **Degree of communication:** Frequent group interaction, teacher-to-individual student, student-peer collaboration, resources only
 - **Class size:** Individual, moderate class size, larger audiences, massive (MOOCs)
3. **Informal and semiformal learning** In reality, informal learning can use many delivery modes, although we typically think of them being applied on the job or in the field (coaching and mentoring, working in teams), in the home (self-directed learning through use of online resources or reading books and journals), in cafes and restaurants (socializing with colleagues), in online forums (professional community social media), or at professional events (conferences and professional society meetings). These modes are highly underused, even if they are important learning opportunities for those that have the good fortune to take advantage of them.

Decisions about Formality and Modes

Making decisions about levels of formality and delivery modes (as well as Learning Strategies, which are discussed in another resource) requires consideration of a variety of criteria. Below these criteria are organized into 3 general categories. In the next section, specific criteria for each category are listed.

- **Practical** criteria are those related to factors not about what needs to be learned, but related to the nature of the organization and the capabilities of those responsible for training. These include things like budget, numbers of learners, deadlines, training experience, etc. Practical constraints may override all other criteria unless a good case can be made. Practical criteria may be most salient to managers not familiar with the content to be learned or pedagogical options.
- **Learning Needs** criteria will ideally drive most decisions on learning solutions, since the likelihood of achieving learning outcomes should be the primary basis of the decisions. Learning Needs criteria might include complexity of the skills to be learned, tools required to apply the skills, how often learners need to use the skills, how formally learners must be assessed or certified, and whether tasks to be learned are cognitive, manual, or social. Learning needs criteria may be overridden if the other criteria are inflexible. Criteria can sometimes be in conflict with one another, requiring careful decision making.
- **Pedagogical Values** criteria are those that lead us to make decisions based on beliefs about the nature of learning and the capabilities of the various delivery modes. These might include preferences for trainer-centered versus student-centered learning, collaborative versus independent learning, structured versus open learning environments, and experiential learning versus direct instruction. Pedagogical beliefs may be based on research evidence, based on personal experience (negative or positive), or based on philosophical preferences. They can also be based on limited exposure to or understanding of the options available. These values, while ideally less important than learning needs and practical constraints, will always come into play. They can cause us to reject potentially good solutions if we see the values as essential and not choices.

The relative weight of the criteria will depend on your degree of certainty about them and/or on how extreme they appear to be (e.g., if the complexity of the task to be learned is considered very high by all those involved in planning, it may outweigh practical criteria that suggest taking a simple learning solution). Some criteria will rise in priority and quickly narrow down potential solutions. However, all important criteria should be considered.

In most cases, blended learning solutions, those that combine levels of formality and delivery modes in complementary ways will offer the best option. Using blended solutions can help to meet multiple criteria that a single solution is unable to address.

A very general and useful process that can be followed for making learning solutions might include the following steps:

1. Consider the **Practical Criteria** that appear fixed and non-negotiable. These will likely be raised previously by stakeholders and managers, but if not, you can ask questions. Eliminate solutions that do not fit the inflexible practical criteria.
2. Consider **Learning Needs** criteria to help refine your decisions. You may also decide that some of these might rise in importance even above what seem like inflexible Practical Criteria, suggesting that you should alter your list of initial choices.
3. Reflect and consider whether **Pedagogical Values** are coming into play too much or not enough. How important are these for learners and trainers involved?
4. Justify your decision about the learning solution or blend of solutions to stakeholders, stating which criteria led you to the decision.

Possible Criteria for Choosing Learning Solutions and Delivery Modes

Practical Criteria

- Time available to plan and develop training
- Budget available to plan and develop training
- Geographic distribution of students
- Training staff availability
- Skills of training staff
- Content expertise availability
- Student audience size
- Staff stability (age, mobility)
- Technology available

Learning Needs Criteria

- Learning goals (professional mastery, basic skills, prerequisite knowledge, continuing development)
- Learning outcome levels (remember, understand, apply, create/evaluate)
- Nature of tasks (manual skills, decision making, group or team processes, ...)
- Complexity of the task or content to be learned
- How well the desired level expertise is defined. (Do competency frameworks exist? Does the training intend to go beyond basic competency?)
- Frequency of application of skills
- Stability and longevity of the content
- Time available for learners to reach learning goals
- Formality of assessment (certification, demonstration of improvement, proof of completion, no formal assessment)
- Desire to build an ongoing community of learners
- Preparation of learners (background knowledge)
- Diversity of learners (e.g., level of preparation or organizational contexts)

Pedagogical Values Criteria

- Preferences toward classroom or online approaches
- Collaborative learning versus independent learning
- Constructivist (student-directed) versus teacher-directed
- Learner-centered versus teacher-centered (individual learning plans versus normative plans)
- Natural learning environments versus constructed environments (on-the-job versus in the classroom or online)

Some Common Formality Levels and Delivery Modes

Many training developers will not consider formality level and delivery modes separately. Their thinking may go directly to approaches that include both decisions (and perhaps a specific Learning Strategy as well). This can be limiting, but it can also be expedient. The list below includes some such approaches categorized under the Formal and Informal/Semi-formal categories.

Formal Learning: Courses and Programmes

Courses are learning events made up of a series of activities, presentations, or guided projects in a defined period of time (with a specific start and end). In general, participants are expected to attend the entire event, which may include a formal assessment. Programmes are multiple courses leading toward a qualification, certificate or diploma.

- Short classroom courses, one week or less (can include workshops, seminars, etc.)
- Long classroom courses, multiple weeks
- Online courses, mostly synchronous (made up of live presentations or webinars)
- Online courses, mostly or fully asynchronous (mostly self-directed, with limited or no live sessions)
- MOOCs (courses open to large numbers of participants and having limited instructor assessment)

Informal and Semi-Formal Learning

- online seminars or webinars (often less than a day, but might be grouped in a series)
- conferences or seminars (in-person meetings)
- self-directed learning (the learner accesses information and learning resources as recommended or under their own initiative)
- on-the-job training (job practice under the guidance of an experienced colleague or supervisor)
- a job manual or documented instructions (using printed or online resources for self-help on the job)
- mentoring and coaching (an assigned, more experienced person provides periodic guidance over an extended period of time)
- learning from colleagues (in-office or off-the-job discussions, or via an online community, sometimes through formal or informal communities of practice, including online discussion forums or blogs)
- working in teams (with peers or more experienced colleagues)
- working independently (trying new tasks to improve work outcomes)

Blended solutions

Often the best choices for learning are combinations of the above solutions or variations on them. This way, learners benefit from the range of unique qualities they have to offer.