**Evaluation Recommendations for JetBlue Airways**

Dear Lucy,

Thank you very much for contacting me regarding evaluation of JetBlue University’s “Principles of Leadership” course. I would be happy to help guide you with the selection and design of evaluation tools to measure the success of your “POL” project.

I see that your mission at JetBlue U is “Preparing crewmembers for exceptional career success at JetBlue” and I understand through some Internet research that you already have a very successful training program that has been lauded in the press by Forbes, J.D. Power, & Reuters on the Internet *(see references)*. Your internal and external customer satisfaction ratings have been exceptional and consistent over the last 3 years. Congratulations! I also understand that your considerable growth in the last few years has created a need for a more robust training program for the growing numbers of crewmembers taking on leadership roles.

In our telephone conversation yesterday you stated that your President and CEO, Dave Barger asked “how he would know when the project was successful.” We will need to pull together enough compelling evidence to satisfy Mr. Barger’s questions. We’ll do this by conducting a detailed evaluation process to build a “chain of evidence (Kirkpatrick & Kirkpatrick, Implementing the Four Levels, 2007, pp. pp. 123-128)” that will justify the value and success of your program. Not only will the results provide credible evidence showing the value of training as it affects the bottom line of the business, it will also reveal the strengths and weaknesses of the instruction.

We will need to determine some baseline factors before we start implementing the framework, so I will need to clarify a few things first. If you don’t mind, here are some questions for you:

* Who are the stakeholders that will be involved in the evaluation and what their roles and responsibilities are?
* What role does leadership play for each of the associates (Airport & Ground Operations, Inflight crewmembers, Pilots, Reservation Agents, System & Technical Operations)?
* Are there any specific issues with the current POL training that you would like to focus on?
* Do you have a budget and timeline in mind for this evaluation?
* Are you planning to adapt the current POL training, or start from scratch with a new instructional design?
* What assessment and evaluations are already in place in your design and what, if any, results can you share with me?
* Will you be using the same facilities and instructors as you have been?
* Might there be any other specific uses for the results of this evaluation?

Before we begin designing the evaluation model and developing assessment instruments it will be important to proceed with the following (based on the Dow Model (Dow)):

*Identify and define the roles and responsibilities of all the stakeholders:*

We will need to identify which stakeholders will be involved in the process. We will request their participation, collaboration and support and get their continued commitment. We will emphasize the value of learning so they can commit to future additions to program and get their “buy-in.”

*Conduct a needs analysis based on those stakeholders:*

The needs analysis will define the objectives, clarify the outputs, and identify resources.

*Develop a framework for the evaluation:*

In addition to the evaluation framework based on the Kirkpatrick (Kirkpatrick & Kirkpatrick, Evaluating Training Programs, 2006) and Dow models (Dow), we will develop the actual assessment instruments to be used with the crewmembers (see below for proposed framework).

*Implement the evaluation:*

Conduct the evaluations within the parameters of the budget, schedule, facilities, participants and any other available resources.

*Disseminate our findings to the stakeholders:*

Create a compelling final report and effectively present it to your stakeholders with interpretations and recommendations.

**The Proposed Evaluation Framework** (based on Kirkpatrick’s Evaluation Model):



**Level I - REACTION**

This first level of evaluation will be conducted to determine the satisfaction of your trainees and assure them that their input in this process is important. We need to measure their reactions to the POL course and determine the degree to which they find the training relevant to their job. We will set the expectations for the process with the crewmembers so they will know this evaluation is part of an ongoing process and that their honesty, consistency and anonymous input will help us to develop our program and reinforce the company’s commitment to it’s core values: safety, caring, integrity, fun and passion (JetBlue).

The questionnaires used for this evaluation will be anonymous and simple, using a five-point Likert scale (Trochim, 2006) to measure trainee satisfaction. Questionnaires will be administered during the training and designed to be engaging in order to guarantee the 100% response rate that will be needed to proceed to Level II of the evaluation.

**Level II - LEARNING**

Level II of the evaluation will determine the effectiveness of the course. It will demonstrate the value of the course by showing that the trainees came away with new learning in the form of knowledge, skills and/or changed attitudes. We will use Level I data, as well as pre- and post-assessment tests to compare and show what kind of change has occurred because of and during the training.

Instruments will include knowledge tests and checks, skills observations, surveys and questionnaires to determine what knowledge, skills and attitudes the associates need to perform their new leadership skills effectively in the field.

**Level III - BEHAVIOR**

This level of evaluation shows how well the newly learned leadership skills from the POL course transferred to their behavior on-the-job. This evaluation will also reveal whether the trainees are receiving support from their superiors in the field, and to what degree.

Following the course, we will send out surveys to the associates to be completed on paid company time to determine how their learning and new leadership skills lead to any behavioral change on the job. We will also conduct follow-up phone interviews after collecting the data from the surveys to find out to what degree this change occurred.

**Level IV - RESULTS**

Results will be identified in the assessment phase of the development of the program and will show a compelling relationship between learning and business outcomes. These results will satisfy Mr. Barger’s initial request and help him to make future decisions regarding JetBlue University based on the proven value of your training.

In conclusion, I want to assure you that I will work hard with you to ensure this evaluation process will be (a) cost-effective; (b) strategically timed; (c) integrated with your current training; (d) accurate; (e) engaging; (f) practical; (g) helpful; (h) participatory; and (i) useful (CDC, 2011). Thank you again for asking me to guide you in this evaluation process. I look forward to hearing from you this week in order to finalize our plans.

Sincerely,

Freddi Rokaw, Purdue University

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