

POL EVALUATION PLAN

Created for Lucy Learned, Training
Specialist – Jet Blue Airways

Dear Lucy,

Thank you for trusting Davis Consulting Inc. to create an evaluation plan for JetBlue University's "Principles of Leadership (POL) program. I have studied the development of your company since its creation in 2000 and am a true believer in JetBlue's business goals. I have prepared for your review an Evaluation Framework - sort of a guide map in helping us decide what to evaluate and why. As you get ready to implement this plan, please keep in mind the importance of maintaining your focus on the objectives for each level. This report should give you a short overview of what the evaluation plan is, what recommendations I have for the POL, what data will be collected, and how the results can impact JetBlue. It is an honor to be able to assist you with this process.

This evaluation plan includes:

- Training Program Overview
- Why Evaluate?
- Summary of Kirkpatrick and Kirkpatrick's Four Level Evaluation Framework
- Data Collection Plan
- Process
- Measurements of Success

Once you've had a chance to go through the framework, please give me a call so we can talk about the details and particulars. There is a lot of information in this report, and my job is making sure you're comfortable and knowledgeable about the evaluation process. I look forward to hearing from you.

Ginger Ciuperca
Davis Consulting, Inc.
gciuperc@davisconsulting.com
404-488-8219

September 9, 2014

Training Program Overview:

JetBlue President Dave Barger and CEO David Neeleman endeavored to build a company that not only honored and glorified air travel, but also honored and glorified both its employers and its clients. They “sought to redefine the airline-customer relationship” (CPP p1) by providing exceptional customer experience. For their employees their mission statement was “The Power of the People”. They wanted to “maintain the spirit of a small, service-driven company” (CPP p1) offering unique customer experience that supported these principles: treat your people right; do the right thing, communicate with your team, encourage initiative/innovation and inspire greatness in others.

For the past eight years in a row, JetBlue Airways has received the J.D. Power & Associates award for “Highest in Customer Satisfaction Among Low-Cost Carriers in North America” (www.jdpower.com). This achievement shows the dedication and commitment of JetBlue Airways and the JetBlue University. The creation of the new Principles of Leadership (POL) course from the training department shows the forward thinking of the company. Since the beginning of the company, there have been some issues dealing with rapid growth which have created challenges, especially in regard to training new and current associates.

Why Evaluate?

Dave Barger states (Kanani 2012 p5), “It’s one thing to have strategy, but you absolutely have to have the right organizational structure to execute the strategy.” The core values that Barger identifies as being pertinent to that structure are: embracing change, creation of a strong brand, keep communication open and strong to support teamwork and an interpersonal understanding of “the nuances between management and leadership.” Having set that standard, it was observed through JetBlue’s annual Speak Up Survey that, due to frequent rapid advancement of management personnel, graduating leaders were not exhibiting the tools and training to support their success in these areas. Barger states “We want people on the team who see the world the way we do.” (Kanani 2012 p4)

The goal for the POL program is the alignment of company core values with key stakeholder’s objectives, for the purpose of upholding the JetBlue company philosophy. The purpose of this evaluation is to analyze what tools and training are currently offered and utilized at POL, and what areas are not being addressed and/or supported. The business structure of JetBlue is built an integration of executive, management, employee and client connectivity, communication and service. All parties are stakeholders in the success of the POL training. For this evaluation, though, we will focus only on the participants in the POL Program. Strengths of the program will be measured by how well the training is able to demonstrate a measureable degree of participant ease for implementing tools and skills.

Recommended 4-Level Evaluation Framework based on industry standard of Kirkpatrick &Kirkpatrick:

Level	Definition	Explanations
Reaction	To what degree participants react favorably to the training	Includes participant satisfaction; the degree to which they are actively involved in and contributing to the learning experience; the degree to which they will have the

		opportunity to use or apply what they learned in training on the job
Learning	To what degree participants acquire the intended knowledge, skills, attitudes, confidence and commitment based on their participation in a training event	Includes: Knowledge: I know it Skill: I can do it now Attitude: I believe this is worthwhile to do on the job Confidence: I think I can do it Commitment: I intend to do it
Behavior	To what degree participants apply what they learned during training when they are back on the job	Processes and systems that reinforce, encourage and reward performance of critical behaviors on the job
Results/ROI	To what degree targeted outcomes occur as a result of the training event and subsequent reinforcement	Short term observations and measurements suggesting that critical behaviors are on track to create a positive impact on desired results

Chart adapted from The New World Kirkpatrick Model (2013)

Data Collection Plan

Level	Objective	Methodology	Timing	Participants
1.Reaction	Measure the level that the participants feel the training provides a foundation for core values and application of those core values.	interviews; short answer surveys to measure initial/ending attitude towards the training.; portfolio entries w/prompt statements	1.Short answer survey at onset of training for attitude base level 2. Interviews, survey and portfolio review at completion of the program	Trainees, instructors, L&D Group
2.Learning	Identification of and examination of the 5 learning skills (knowledge, skill, attitude, confidence, commitment) with respect to core values and the application to management strategies/actions	ILT and WBT assessments by SME, instructor and peer feedback dialogue; case study scenarios w/ questionnaires covering participant self -evaluation of the Level 2 learning skills	1.During training 2. End of training	Trainees; SME; instructors; L&D Group
3.Behavior	Application of the 5 learning skills (knowledge, skill, attitude, confidence, commitment) with respect to core values and their application to management strategies/actions	Action cards; scenario simulations; problem story, portfolio log entries; SME, instructor and peer feedback, ILT and WBT assessments	During training	Trainees; SME; instructors, L&D Group, executive management
4.Results/ROI	Demonstrate knowledge and confidence of core values and how to apply them to management situations	on the job scenario questionnaires; portfolio log entries, interviews; peer and management reviews	Ongoing 180 days following training	Trainees; colleagues; L&D Group

Process

Davis Consulting, Inc. will initially meet with the executive management staff and POL instructors to provide an overview of the process and open the process to feedback. Davis Consulting, Inc. will be responsible for creating, implementing, collecting and analyzing the data for the evaluation. At the end of the evaluation period, a report will be provided summarizing feedback, log entries, and survey results. The rubric provided for the objectives at each level will transfer qualitative data to quantitative data (ROI). For example, the comprehensive summaries will be two analyses of the data. One will be conducted by an external evaluator provided by Davis Consulting, Inc. The second analysis will assign one of our evaluators to lead your L&D Group through an internal evaluative process. This will provide an internal/external perspective of the data.

Measurements of Success

Level One: It's important for the training department to know if the learners felt the training was beneficial, or if changes need to be made to the program. A simple "smile sheet" or reaction survey will be completed before the learners leave the training. This self-reflection is one of the characteristics emphasized by management at JetBlue. Initial short answer surveys that allow for self-reflection of trainee attitudes will provide initial feedback for the POL program. Re-submission of initial prompts will be issued at the end of program in conjunction with interviews by management and peer review of portfolio entries. Developing an evaluation framework around information provided by trainees is in alignment with the JetBlue mission statement "The Power of the People."

Level Two: Acquiring knowledge of and gaining conscientious awareness of that knowledge are important tools for life-long learners; a secondary goal of the POL program. By using open dialogue and reactions to case studies, the recognition of concepts and internalization of core values will be measurable. SME's will be utilized to provide examples and guide the analysis. Group assessments and self-tests will check for understanding.

Level Three: Demonstrated action of the learners ability to define the relationships between the learning skills and the core values will provide evidence of the program's ability to prepare trainees to efficiently apply the skills they are learning. Knowledge assessments (web-based training) will reflect on the accomplishments to measure growth of trainees skills and knowledge retained in Levels 1 and 2.

Level Four: On the job experiences and ongoing evaluation, self-reflection, peer assessment and management reviews that either depict or show the absence of application of core values to actual real world situations will reveal if concepts were truly understood and internalized. Continuation of the dialogue/communication process as well as self-reflection and peer review will reinforce the ideology set forth during the POL training.

References:

CPP Inc. JetBlue bridges leadership gap with comprehensive development program for crewleaders. Viewed 8/22/13 Retrieved from. https://www.cpp.com/Pdfs/jetblue_case_study.pdf

Dow Chemical Company. (1992). Evaluation of training: The Dow process. [Manual]. Midland, Michigan: Author

Kanani, R. (2012). 5 leadership lessons from jetblue’s president and ceo. Forbes. October 4, 2012. Retrieved from http://www.forbes.com/fdc/welcome_mjx.shtml

Kirkpatrick, D.L., & Kirkpatrick, J.D. (2006). Evaluating training programs. San Francisco: Berrett-Koehler Publishers, Inc.

Kirkpatrick, D.L, & Kirkpatrick, W.K. (2013). The new world kirkpatrick models. Kirkpatrick Partners: The One and Only Kirkpatrick. Viewed 8/27/31. Retrieved from <http://www.kirkpatrickpartners.com/OurPhilosophy/TheNewWorldKirkpatrickModel/tabid/303/Default.aspx>

Posavac, E.J. (2010). *Program evaluation: methods and case studies*. 8th ed. Boston: Prentice Hall

Taylor-Powell, E., Steele, S. (1996). Collecting evaluation data: an overview of sources and methods. *University of Wisconsin Cooperative Extension* Viewed 8/22/13. Retrieved from [http://c.ymcdn.com/sites/www.myan.org/resource/collection/4F362C4A-6CFB-4FF2-92FC-09C8898B6121/Collecting_Evaluation_Data_\(University_of_Wisconsin\).pdf](http://c.ymcdn.com/sites/www.myan.org/resource/collection/4F362C4A-6CFB-4FF2-92FC-09C8898B6121/Collecting_Evaluation_Data_(University_of_Wisconsin).pdf)