Week 1: Activity #2 – jetBlue Case Study

Student: Ritika Bhargo

Department of Learning Design and Technology, Purdue University

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After reviewing the **Week 1 - Activity #2 - jetBlue Case Study**, respond to the following questions to help get you started on preparing a proposal for evaluating the jetBlue POL training:

1. **What things might you suggest Lucy consider if she wants to complete a program evaluation of the POL training** (e.g., identifying organizational goals for the training, identifying relevant stakeholders who need to be involved)? List at least five things you would suggest.

**I would suggest the following:**

1. **Determine and clearly define organizational goals and objectives –** This is twofold:
	* What are your goals for the training program and what do you hope to achieve through the program? How do these goals align with the strategic imperatives of the organization?
	* Clear learning outcomes need to be identified as well – what should the learners be able to accomplish after they complete the training?
2. **Learner analysis** - Conduct a learner analysis to understand the POL trainees’ prior experience, current competencies, and learning preferences
	* Who the learners are (background, roles, experience)
	* What they already know (prior knowledge)
	* What gaps exist (learning needs)
	* How they prefer to learn (modalities, constraints)
3. **Evaluation analysis** – Determine success criteria.
	* What does success look like?
	* Determine what evaluation model to use e.g., Kirkpatrick
	* Develop a criterion matrix based on what you know about the training program and the organizational goals/objectives.
	* Completing this task first will also ensure that the input is unbiased as the next stage is to collect feedback and discuss with stakeholders.
4. **Stakeholder and SME input** – Before diving into solutioning, pause and reflect on existing current state and feedback.

**The approach I would suggest:**

* + Inform (in separate group emails) select leaders, trainers, and trainees the purpose of your involvement in the project and your request to them to collect feedback on the effectiveness of the training program.
	+ Schedule focus group discussions with each group (3) to collect feedback. You may choose to send targeted questions with the email so that each group has time to reflect and provide well thought of and constructive feedback during the meeting. Sample questions are listed in the next question.
	+ Asking targeted questions to each stakeholder group will inform you of what’s working and what is not - remember you can’t fix what’s not broken. Use additional activities like the 5Ys to get to the root cause of the problem.
1. **Data Analysis** – Conduct “data mining” by reviewing all the feedback and determine if there are any patterns or trends on what was shared by all stakeholder groups
	* Map the stakeholder feedback against your list of evaluation criterion – are there any alignments?
	* Begin thinking about next steps or possible solutions. Do you have everything you need to make an informed recommendation, or do you need to have a secondary call with each or a select stakeholder group?
	* Support decision-making e.g., if the program needs to be changed in the future with results from the data analysis.
2. **Providing Recommendations** – After following all the above steps, present your findings and recommendations for opportunities for improvement in a succinct manner.
3. **What information might you suggest being collected or examined to determine the effectiveness at each level (Levels 1, 2, 3, and 4)?**

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| **Level** | **Stakeholder**  | **Sample questions**  |
| **1: Reaction** Focus: The reaction to the training offered, overall engagement, and relevance to the job. | The best stakeholder to collect this information from are the Trainees and Trainers. | How relevant was the content to your role (Trainee) or how or what activities were implemented in the training to make the content applicable to the trainee’s role (Trainer) e.g. job shadowing, real-life scenarios, role-play etc.How engaging was the training (Trainee) OR what was done to make the training engaging (Trainer). What exceeded your expectations or did not exceed your expectations about the training (Trainee).  |
|  **2: Learning** Focus: Assessment of learning and of their level of confidence in applying the training to their job. | The best stakeholder to collect this information from are the Trainees. | Do you feel confident applying the newly acquired skills to your role? Why or why not?Do you find yourself referring to the training or applying what you learned on the job? |
| **3: Behavior**Focus: The degree to which trainees apply what they learned to their job to enhance performance or change behaviors. | The best stakeholder to collect this information from are the Leaders. | What specific changes have you noticed in the behaviors or performance of the trainees prior to and after the training? How has the training impacted overall productivity or performance of the trainees/employee? |
| **4: Results** Focus: The degree to which you see actual results and organizational impact because of the training. These include impact to the overall business and ROI. | Stakeholder group: The best stakeholder to collect this information from are the Leaders. | Do you believe the investment in the training was well worth the ROI to the business? Why or why not?How and what strategic imperatives of the business has the training been effective in aligning with?  |

1. **Think of jetBlue's current training. How do you think the evaluation of the jetBlue POL training may occur?** Describe or provide the steps you think an evaluation of the POL training might include. Hint - Fitzpatrick et al. (1988) give some basic types of evaluation starting on page 20 of the article. Pay special attention to Table 1.2 on page 24 to help guide your thinking process.

In the current training there appears to be no mention of assessments, collection of survey feedback or a determined list of identified KPIs (1-3 metrics) to measure the success of the training program or actual behavior changes. The only aspect I know is the expectation around simply completing the training, which is not enough to measure or evaluate the effectiveness of the training program.

**The evaluation of the jetBlue POL training may include the following:**

* 1. **Embed a survey –** The frequency of data collection should be high. To gather ongoing feedback form Trainees and understand the overall engagement and relevance of the program, understanding their application of the learning and confidence in applying the learning to their role. Every trainee batch must be requested to provide feedback and if low survey feedback, then consider arranging focus groups for targeted conversations.
	2. **Conduct pre and post knowledge assessments** – This can be beneficial in gaining data around the Trainee’s knowledge of the topic prior to the training versus after the training. This can be a data point in understanding how the training has shifted behavior.
	3. **Observations and performance monitoring** – While this may be a bit more difficult to achieve, to collect additional data to observe trainee engagement, participation, and understanding of the materials (assessment scores etc.).

**References:**

Kirkpatrick, J. D., & Kirkpatrick, W. K. (2016). *Kirkpatrick's four levels of training evaluation*. ATD Press.

Worthen, B. R., Sanders, J. R., & Fitzpatrick, J. L. (2004). Program evaluation: Alternative approaches and practical guidelines (3rd ed.). Allyn and Bacon.