A CASE EXAMPLE OF ASSESSMENT AND EVALUATION: BUILDING CAPABILITY IN A CORPORATE UNIVERSITY

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One corporate university makes measurement a priority by dedicating resources and assigning responsibilities to a centralized analytics function: the assessment, measurement, and evaluation team. As more measurement became a focus for learning and business leaders alike, the more the team became motivated to take a critical look at how it was approaching assessment, measurement, and evaluation activities and how it could leverage its capabilities, technology, and processes to have a greater reach across the organization.

THE ABILITY TO EVALUATE the effectiveness and efficiency of a learning organization has continued to be the highest priority in enterprise learning and talent management, according to a survey conducted by Bersin & Associates (2006). JetBlue University (JBU), the centralized learning function within JetBlue Airways, has made measurement a priority since its inception in 2002. Inherent in its mission, “Prepare crewmembers for exceptional career success at JetBlue,” is the need to measure the effectiveness and efficiency with which the university is able to achieve its goal.

JBU makes measurement a priority by dedicating resources and assigning responsibilities to a centralized analytics function: the assessment, measurement, and evaluation team (AME). Measuring the impact of learning consistently and throughout the enterprise, however, is still a challenging task. The more measurement became a focus for learning and business leaders alike, the more the AME team was motivated to take a critical look at how it was approaching assessment, measurement, and evaluation activities and how it could leverage its capabilities, technology, and processes to have a greater reach across the organization. The answer: strong strategies and processes, clear communication, consistent implementation, and comprehensive performance support tools and technology. The impact: transfer of assessment, measurement, and evaluation capability throughout the university, resulting in enhanced use of data to make decisions.

THE AME APPROACH: EVALUATION AND ASSESSMENT STRATEGIES AND TOOLS

AME’s driver of change and results is a concept that this team refers to as collaborative franchising. AME has leveraged appreciative inquiry (AI; Cooperrider, Whitney, & Stavros, 2003; Preskill & Catsambas, 2006; Watkins & Mohr, 2001) to engage learning faculty in the design of measurement strategies and processes and identify tested and effective practices in assessment and evaluation based on the participants’ experiences. JBU relies on standard evaluation and needs assessment strategies, consistent processes, and supporting tools and resources offered by the AME team.

JBU Evaluation Strategy

AME found its place of most potential to be working as a partner with JBU faculty. The team worked against being perceived as the ivory tower of analytics or subject matter experts with all the answers. Using the AI methodology through focus groups, the team surveyed faculty members...
to draw on their most effective evaluation experiences to formulate a vision for the future of evaluation at JBU—together. The resulting strategy for evaluating learning programs was a blend of theory and practical application, a combination of common experiences and external research and benchmarking.

As seen in Figure 1, the JBU evaluation strategy suggests a process flow, supporting tools, appropriate stakeholders to involve, and information about types of evaluation and their focus. AME divided the evaluation strategy framework (see Figure 1) into five parts to maximize its educational value and usability. The collaborative franchising approach works to encourage all faculty to follow this single, common strategy and tools in support of consistent measurement practices across the university.

**Type of Evaluation.** The first section, Type, denotes the phase or level of evaluation. The levels were named to clearly communicate the evaluation phases at JetBlue. AME was not interested in creating a new model.

**Process of Evaluation.** The second section, Process, provides decision-making support about the extent of resources that should be invested in evaluating each program. The process created and communicated at JBU requires that the decision to evaluate at an impact level must be made only after examining the criticality of the content, resources invested in developing and delivering the program, and visibility of the course to the organization. This deliberate approach leads to sound decisions about resource allocation and meaningful data that are more likely to be used, as opposed to setting goals for the percentage of courses that JBU will evaluate at levels 3 and 4 (e.g., 100% level 1, 80% level 2, 50% level 3, 20% level 4).

**Tools to Support Evaluation.** The Tools section was designed to directly support the process. It outlines the job aids and workshops that AME offers to increase knowledge, skills, and motivation for each type of evaluation. Critical to the goal of building the AME capability of JBU faculty, the tools represent a combination of guided and self-directed performance support that were developed based on research and industry best practices.

**Involvement.** For action to be taken on evaluation data, the evaluation process must be a collaborative effort, and all stakeholders must be involved at appropriate times. AME chose to dedicate a section to involvement on the evaluation strategy diagram to ensure that communication and engagement of stakeholders are considered with any evaluation effort. This section differentiates the types of evaluation and takes into consideration the span of control and span of influence for JBU and its operational counterparts (e.g., business units).

**Focus of Evaluation.** The Focus section of the evaluation strategy diagram further educates JBU faculty on the purpose of each phase of evaluation, using practical questions so that they can align their data collection needs with the appropriate phase, tools, and involvement.

**JBU Needs Assessment Strategy**

An unintended consequence of communicating and implementing the JBU evaluation strategy was that it highlighted the need for a formal and defined needs assessment strategy. As faculty became more motivated to conduct impact evaluations, they became more aware of the need to have clearly defined goals at the beginning of the project. Needs assessment and evaluation are essentially two sides of the same coin, and so AME modeled the structure of the evaluation strategy framework with the needs assessment strategy framework (see Figure 2). This design decision was made to capitalize on the familiarity that JBU faculty had gained with the JBU evaluation strategy, to further demonstrate the alignment between assessment and evaluation, and to tie some of the tools together, including those that encourage the creation of an evaluation plan at the start of a project.

The Needs Assessment Phase section uses a simple structure of define, analyze, and select (Douglas & Schaffer, 2002). The Needs Assessment Process focuses on performance consulting and alignment with business needs as critical skill sets for JBU faculty, especially with JetBlue’s recent adoption of Kaplan and Norton’s (1992) balanced scorecard methodology. One of AME’s goals in defining the process steps for each phase was to illustrate to JBU faculty what they would be missing if they skipped one of the phases due to time or resource constraints.

The Tools, Involvement, and Focus sections, similar to those in the JBU Evaluation Strategy, serve to build needs assessment capability within JBU and further enable AME’s transition from a pair-of-hands role to a more consultative role (Block, 1999).

**Centers of Excellence**

Successful franchising is dependent on two tactics: communication and consistency. AME maintains unique strategies, a robust tool kit, and a collaborative approach to facilitate their evolution from a data collection unit to a group of internal consultants facilitating a culture of measurement and evaluation. Using Microsoft SharePoint, AME created a place where faculty can “go” to learn, discuss, share, and access materials just-in-time. As shown in Figure 3, the Centers of Excellence (CoE) provide a space...
FIGURE 1. JETBLUE UNIVERSITY EVALUATION STRATEGY
FIGURE 2. JETBLUE UNIVERSITY NEEDS ASSESSMENT STRATEGY
for faculty members to learn about needs assessment and evaluation techniques; access the JBU evaluation strategy and JBU needs assessment strategy; and review templates, tools, and job aids as they are relevant to different parts of a project. One of the most important functions of the site is to provide a forum for faculty to share measurement challenges, solutions, and success stories with their peers. In conjunction with the CoE, AME offers a set of workshops focused on the following:

- Turning evaluation data into action.
- Building and analyzing tests using best practices.
- Making informed decisions about when and how to use resources on impact evaluations—Kirkpatrick’s (1994) level 3 and beyond.
- Driving collaborative relationships between JBU leaders and their operational counterparts to align with the business unit before even accepting a new project.

Continual Improvement

AME’s efforts to build assessment and evaluation capability continue to gain momentum. Faculty members are more willing to take ownership over their data collection knowing that AME is available in a consultative role. The team is also experiencing synergies with JetBlue’s strategic management process and the renewed emphasis on proving business impact. JBU faculty members have been conducting more assessments and are showing increased interest in higher-level evaluations (job application, behavior changes, and business results). AME continues to improve on strategies, tools, and processes by receiving ongoing feedback from practical experiences, as well as reviewing new research and benchmarking studies. Following the rollout of the evaluation and needs assessment strategies and the supporting CoEs, AME conducted a study guided by the following exploratory research questions:
1. What are the successes of the assessment and evaluation efforts?
2. What major success factors contribute to the development of assessment and evaluation capability?
3. What are the areas of improvement to the development of assessment and evaluation capability?

CASE STUDIES

A comparative multiple case study design was used to analyze the impact of three assessment and evaluation projects. In an effort to identify and promote the best possible outcomes and practices in the assessment and evaluation projects based on the participants’ experiences, the AI approach was adapted in this study. Specifically, Hammond’s (1998) foundation assumptions of AI, as cited in Rosenzweig and Van Tiem (2007), have been adapted as the guiding principles. The focus was on identifying the processes and practices that worked within the given environment and following the affirmative threads to retain and represent the greatest strengths.

Participants and Procedures

The participants in the study were three project managers, representing three different assessment and evaluation projects. A different AME analyst conducted a one-on-one interview with each project manager, using the interview questions shown in Table 1. After the interviews, the analyst team hosted a meeting with the project managers to validate interview responses across the three groups and uncover the realities that were unique but coexisting to the different groups of stakeholders. Qualitative data analysis was then conducted using the

<table>
<thead>
<tr>
<th>TABLE 1</th>
<th>INTERVIEW QUESTIONS BASED ON APPRECIATIVE INQUIRY</th>
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<tr>
<td>INTERVIEW QUESTION</td>
<td>ASSUMPTION</td>
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<tr>
<td>1. WHAT WORKS</td>
<td>2. RIGHT FOCUS</td>
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<tr>
<td>What was the goal of your project? Result?</td>
<td>✓</td>
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<tr>
<td>Who is the driver of your project?</td>
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<tr>
<td>How did AME add value to your project? How effective/efficient was JBU evaluation/needs assessment strategy for you?</td>
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<td>What is your overall process?</td>
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<td>What were the results of the assessment/evaluation?</td>
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<td>How would you do it again?</td>
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<td>What made it successful?</td>
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EXHIBIT 1 CASE 1: GROUND OPERATIONS EVALUATION

Application of the JBU evaluation strategy and processes resulted in a positive financial impact, lowered training attrition rates, and improvement on operational performance and safety metrics. The project team looked at cost comparisons and instructor utilization for the Initial GO program. Instructors spent 52 hours per class before changes were made to the program and 40 hours per class after the program was modified, resulting in a savings of 480 instructor hours per year. The attrition rates improved significantly, also contributing to cost savings due to enhanced access to productive employees and reduced spending of time and money on additional training classes to refill the positions of those who did not make it through the original training.

There was a reduction in attrition by 9% in one campus and 2% in another. Finally, targeted performance and safety metrics were improved, as content was specific to addressing these metrics.

Finding What Worked

Increased access to feedback. The College of Airports modified its approach to how it administered surveys, by asking crewmembers to complete them before they left the classroom. Survey response was increased from less than 20% to greater than 80%, providing more holistic and relevant feedback to be used for continual improvement of the program. Additionally, they leveraged collaboration software to gather specific instructor feedback regarding the curriculum and response from class participants.

Clear definition of evaluation goals and communication plan. In addition to accessing content on the Center of Excellence, such as the focus group job aid and communicating results job aid, the AME team supported the clear definition of evaluation goals and the identification of appropriate data collection and analysis, and offered guidance on how information could best be summarized and presented to the stakeholders so that it would lead to action.

Possibilities for Building the Future

Obtain buy-in from all stakeholders. Not only can stakeholders be leveraged to increase response rates and support data collection efforts, but their buy-in is also directly related to how receptive they will be to reviewing and acting on the feedback that is collected.

Be deliberate with timing and scheduling data collection activities. Take into consideration peak times in the operation, as well as holidays and recent changes in policies or procedures. It is nearly impossible to compete with the needs of the operation. The College of Airports initially followed the recommended 6- to 9-month follow-up time period for an evaluation strategy plan, but found that it was not the ideal timing for the operation.

Practical Application

Three specific projects are presented in this article. Although each is unique in its drivers and objectives, all used the same strategies, processes, tools, and resources.

Case 1: Ground Operations Evaluation. The design team in the College of Airports (CoA) at JBU conducted a needs assessment in June 2006 and developed and launched a revised initial training course for Ground Operations (GO) in March 2007. After the rollout of the new program, CoA leadership desired to demonstrate JBU’s commitment to the business leaders by ensuring the training program was meeting the needs of the operation and the new employees. As the driver of the evaluation strategy, CoA leadership requested that the supervisor of airports training development put together an evaluation strategy for the program and conduct the evaluation. The supervisor collaborated with the AME team to develop an evaluation strategy for the rewritten program. They were in agreement that an evaluation after a 6-month rollout period would provide an optimal time period for an accurate evaluation of the program. The objectives for the evaluation were as follows:

- Demonstrate effectiveness of the GO program.
- Ensure efficient use of resources.
- Ensure preparedness of GO crewmembers.
- Evaluate the GO program for potential enhancements.
- Determine factors in the work environment that have an impact on the classroom training.

Exhibit 1 depicts the background, successes, and implications of the Ground Operations Evaluation case.

Case 2: The Liaison Program. One application of the JetBlue University Evaluation Strategy was untraditional but effective.

In August 2007, a developer from CoA approached the AME team with the need to bring attention to one of their programs and demonstrate the program's value. There had been many leadership changes within the airports operation and JetBlue University, which precipitated a need to bring new attention to the program and demonstrate its criticality. A lack of understanding of the program could result in its discontinuation, as the airports’ operation paid for the program out of its budget (liaisons received a dollar an hour additional pay when performing liaison duties). The main duties of liaisons include managing and delivering on-the-job training for crewmembers at the airports.
EXHIBIT 2  CASE 2: THE LIAISON PROGRAM

The main success of this evaluation effort was the continuation of the liaison program. After the report was shared with airports’ operational leadership, their satisfaction and buy-in resulted in continued support of the program.

Finding What Worked

**Increased access to feedback.** Because the project manager used up-front and thorough communication with the liaisons and their operational leadership about the purpose of the study and how the data would be used, the study participants were very open and willing to provide thoughtful answers.

**Clear definition of evaluation goals and data collection plan.** AME was instrumental in encouraging the project manager to clearly define her goals for the study at the beginning of the project. This support, in turn, helped her to identify an efficient and effective data collection plan.

**Appreciative approach to data collection.** The data collection plan was built using AI principles. The questions asked revealed many best practices that were being applied by liaisons in cities of every size. Over 100 best practices for topics ranging from the selection and scheduling of liaisons to communication practices between the liaisons and the general managers were shared.

Possibilities for Building the Future

**Encourage accountability for implementation of best practices.** Although many best practices were identified and communicated, a lack of discussion on the front end around the implementation of those practices led to limited implementation. The responsibility for ensuring the implementation of the practices was not assigned, and the effects on the liaisons’ and the general managers’ performance seems to have been limited. This project manager will gain commitment for implementation of the results up front the next time a project like this is conducted.

**Approach evaluation efforts as a process, as opposed to an ad hoc project.** Although success of the project was realized through the decision to continue the program and the business leaders expressed their satisfaction with the report, the project manager has not received feedback from the liaisons themselves and is not confident in whether the case study has had any impact on improving on-the-job performance. If the project manager were to conduct the study again, she would plan for and gain support for ongoing evaluation activities, for the purpose of determining the value of the time spent on the study as well as encouraging the implementation of the best practices.

Launched in April 2002, the liaison program was created to support Jetblue University with local training for airports’ crewmembers. In the first stages of the program, each airport or BlueCity at JetBlue designated crewmembers (mostly supervisors) who would be responsible for managing all local training (including all on-the-job training). After implementation, it was realized that supervisors, due to all of their other responsibilities, could not allocate the time and resources it would take to support this program, especially if it was to grow as expected.

By the end of 2003, a group of airport and ground operation crewmembers was selected to fulfill the liaison role and represent their respective BlueCity. Since then, the liaison position has maintained the focus of its original role but has substantially increased the level of responsibilities and tasks to be performed. Today, there are approximately 160 certified liaisons. Currently, 25% of all operational supervisors and two thirds of JBU instructors were once liaisons.

The importance of this project and the existing constraints resulted in an innovative approach that was grounded in the JetBlue evaluation strategy. After a good deal of discussion, the project manager and AME identified the following goals:

- Demonstrate the value of the liaison program.
- Promote best practices for the leadership-liaison relationship.

Exhibit 2 depicts the background, successes, and implications of the Liaison Program case.

Case 3: Reservation Initial Needs Assessment. We have already discussed the concept of needs assessment being the other side of the evaluation coin. This case example demonstrates this mirrored process.

With the cost of oil rising, driving the need to reduce resources spent, JBU made a deliberate move to efficiency, which meant taking a critical look at the length of time and cost of training, combined with attrition rates, and examined whether we were doing the right amount of training. The College of Reservations needed to determine the appropriate balance of time and cost required for reservations crewmembers to achieve proficiency, that is, the point at which they could begin to take calls.

A needs assessment and program evaluation was conducted by the design team in the College of Reservations. The assessment was conducted during January and February 2008, and results were reported to the key stake-
holders in April 2008. The new program has been offered since January 2009 as the new initial training program. The needs assessment had a three-part focus:

- Determine the optimal time to dedicate to initial training.
- Enhance the performance or efficiency of a new crewmember exiting training.
- Identify enhancements to organizational procedures, content, structure, and evaluation process.

Exhibit 3 depicts the background, successes, and implications of the Reservation Initial Needs Assessment case.

CASE STUDY FINDINGS

These case examples demonstrate the potential that exists for increasing a corporate university’s evaluation capacity when individuals conduct needs assessments and higher levels of evaluation using standard processes and tools and assistance from a dedicated assessment, measurement, and evaluation team. First, two primary best practices emerge from the three cases: the importance of “beginning with the end in mind” and the value of targeted and frequent communication.

Begin With the End in Mind

In terms of up-front definition of data collection goals and plans, the initial reservations needs assessment project and the liaison case study facilitated the learning about and implementation of this best practice in different ways. The reservations needs assessment project team began collecting data prior to formally defining their data collection goals and aligning their tools. However, once AME assisted them in the alignment process, they reaped the benefits during the data analysis phase. Along the same lines, they also learned the importance of thinking through potential answers that respondents might submit and the value of including these in a list of choices instead of leaving the question open-ended.

The liaison case study project manager defined project goals before collecting data, leading to a focused data collection effort. However, she learned that she also would have liked to expand on the “begin with the end in mind” mind-set by planning for the evaluation of the project on the front end to determine if the case study had an impact on the liaisons’ job performance.

Targeted and Frequent Communication

Unlike the first best practice, the project managers experienced the value of targeted and frequent communication...
in similar ways. For example, the liaison case study and the ground operations evaluation strategy succeeded in identi-
fying their stakeholders up front, clearly communicating project goals, and developing targeted results communica-
tion presentations, but both also saw unrealized impact
due to a lack of agreeing on roles and responsibilities for
taking action based on the results. They felt that the project
could have been more successful with better communication
and clarification of expectations and accountability.

The initial reservations needs assessment project team
also saw the benefits of up-front communication of proj-
et goals as they gained buy-in at all of the key opera-
tional levels and news of the project spread fast and
people were excited to participate. Similarly, they maxi-
mized the interest level in and impact of their results
communication by presenting it in the format of a busi-
ness case, appealing to their operational leadership audi-
ence who needed to make decisions based on the data.

**Capability Beyond the University**

Although the learning of these two best practices by just
the project teams would have been valuable, JBU
University is fortunate that the impact went beyond that,
affecting both the operational counterparts and other
JBU faculty. As operational counterparts were exposed to
the clearly defined data collection goals, tools, and tar-
geted results communication, their buy-in for needs
assessment and evaluation activities has increased, which
paves the way for future data collection efforts.

In addition, the project managers for the three projects
became champions for assessment, measurement, and
evaluation activities embedded within their own colleges.
They shared lessons learned with other JBU faculty inform-
ally and formally through presentations delivered at the
annual internal JBU Learning Summit. AME has witnessed
the results of this sharing through an increased excitement
around and confidence in conducting assessment, meas-
urement, and evaluation activities. These examples of col-
laborative franchising act as force multipliers for the efforts
of the three-person AME team and are helping to spread
the data-driven culture throughout JetBlue.

**AME Roundtable**

Faculty members appreciated the opportunity to learn
from one another’s experiences in the assessment and eval-
uation projects through informal conversation. Lave and
Wenger (1991) coined the term community of practice
(CoP) to describe an activity system that includes individ-
uals who are united in action and in the meaning that
action has for them and for the larger collective. AME will
support the development of the assessment and evaluation
community of practice by hosting AME Roundtable in
an effort to change the focus of our conversations. We
began working with faculty on data collection methods
and use of technology to automate data collection, analysis,
and reporting. However, if the resources spent preparing
the data are to be fully realized, faculty must begin to pay
close attention to how they enable stakeholders to under-
stand, interpret, and use data in their decision-making
processes (Converse & Weaver, 2008). AME turns its atten-
tion toward discussion about strategies and practices for
using data to affect change and make informed decisions.

**IMPLICATIONS FOR HPT PRACTICES**

Organizations are better positioned to use evaluation find-
ings and embed evaluation practices into their culture and
work processes by participating actively in evaluation
and emphasizing the link between asking questions and
improving practice (Preskill & Catsambas, 2006). In this
article, we reviewed three examples for how JetBlue
University has attempted to streamline its work processes
and create a culture of measurement through standardiza-
tion of strategy and tools, building a community, and
working to enhance capability across all roles. Human per-
formance technology (HPT) practitioners do not require
new models or technologies to make them more effective
in applying the principles of human performance technol-
ogy. Through consistent application of standard process
and tools and the sharing of information and lessons
learned with the HPT community, this field can have a sig-
ificant impact on enhanced data-driven decision making
in the organizations we serve.

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