

Five case study examples have been discussed in Kirkpatrick's book Part 4 from chapter 17 to 21. Please read them all and use the case study rubric listed below to evaluate three out of five examples that you have read to determine the effectiveness of evaluation at your choice, and write a kind of assessment reflection to each example of those three.

Textbook: Kirkpatrick, J. & Kayser, W. (2016) Kirkpatrick's Four Levels of Training Evaluation. ATD Press

<b>Case Study Rubric</b>		
<b>Evaluation Dimensions</b>	<b>Competent</b>	<b>Accomplished</b>
<b>Identification of Issues</b>	With a few exceptions, identifies and outlines the principal problems and issues in the case; demonstrates an acceptable understanding of the company's issues, current situation, and strategic challenges; executive summary provides an adequate overview of the case issues and problems; summary is missing a few minor points, but meets expectations	Presents accurate and detailed descriptions of the problems and issues central to the case; provides a well-focused diagnosis of strategic issues and key problems that demonstrates an excellent grasp of the company's present situation and strategic challenges; descriptions are compelling and insightful; provides a thorough and effective executive summary
<b>Stakeholder Perspectives</b>	With a few minor exceptions, adequately identifies and summarizes the perspectives of the principal stakeholders involved in the case; outlines some conflicts of interest between company stakeholders	Clearly and accurately describes the unique perspectives of multiple key stakeholders in the case; demonstrates insightful analysis of strategic tensions or conflicts of interest between the stakeholders
<b>Connections to Theoretical and Empirical Research</b>	Identifies and outlines connections between some of the issues and problems in the case and relevant theoretical and empirical research; the connections identified are adequately elucidated	Makes appropriate, insightful, and powerful connections between the issues and problems in the case and relevant theory and empirical data; effectively integrates multiple sources of knowledge with case information

<b>Analysis and Evaluation</b>	Provides an acceptable analysis of most of the issues and problems in the case; in most instances, analysis is adequately supported by theory and empirical data; appropriate conclusions are outlined and summarized	Presents a balanced, in-depth, and critical assessment of the facts of the case in light of relevant empirical and theoretical research; develops insightful and well-supported conclusions using reasoned, sound, and informed judgments
<b>Action Plans</b>	Outlines and summarizes some alternative courses of action to deal with most of the issues and problems in the case; in most instances, proposed action plans are outlined, are feasible, and based on relatively sound theory and evidence	Effectively weighs and assesses a variety of alternative actions that address the multiple issues central to the case; proposes detailed plans of action; action plans are realistic and contain thorough and well-reasoned justifications
<b>Evaluation of Consequences</b>	Demonstrates acceptable analysis of the results of proposed action plans; adequately outlines and summarizes the implications and consequences resulting from alternative courses of action; with a few minor exceptions, identified consequences of action plans are related to key issues in the case	Objectively and critically reflects upon alternative plans of action; effectively identifies, thoroughly discusses, and insightfully evaluates the implications and consequences resulting from the proposed action plans; identified consequences are tied to the key issues central to the case

## **Chapter 17**

### **Common Practice in Leadership Program: Greencore Northampton**

At first, this case seemed well-written and informative, but after using the rubric, it clearly fell short. The executive summary is weak and brief, so the issues are not fully explored and analyzed. While the stakeholder expectations are listed on page 157, individual constituencies are not identified and unique perspectives are not explored. The modules of the program structure are based in empirically sound models and practices (e.g. SDI, Action Learning Model, cross functional problem solving, 360 communication), but discussions of these models and connections to research are glossed over. Later, the design, analysis, and evaluation closely follow New World Kirkpatrick Model, but the author does not specifically name it. The only stated problem is the desire to grow, and the case is not made that the targeted objectives will meet those needs (p. 158). Alternative courses of action are not given. The majority of paperwork deals with evaluation Kirkpatrick of Levels 1 and 2. Level 3 Behaviors are described but evaluation methods are not clear (pp. 159-160). Level 4 Outcomes, the “positive results” or measures of leading indicators, are listed on page 64, but methods of evaluation for most of these are not given. Much of the data gathered is subjective in nature (surveys, questionnaires) so it would have strengthened the case study if the criteria for judging these behaviors were included with the paper work.

**Chapter 18**  
**Service Over and Above the Rest (SOAR) Program:**  
**Emirates Airline**

This case started strong with a well-written executive summary and identification of the issue (explained further in the policy statement (pp. 167-168). Several stakeholders are mentioned, and their roles and relationships in the case study are discussed but unfortunately, neither their unique perspectives, nor their conflicts of interest are thoroughly explored. The case specifies that it is grounded in the ADDIE training model and Kirkpatrick business partnership principles (primarily Kirkpatrick) and proceeds to explain four arms for their strategy, based on these models: Pre-SOAR preparation, Coach for Performance, Formalized on-the-Job Support, and the Evaluation and Reward Strategy (pp. 169-170). Each section of the case study is analyzed and explained in detail and connected back to the theoretical model. Action plans are realistic, well reasoned and supported, and carefully laid out, but various alternate actions/plans are not explored in detail. In the results sections, stated outcomes were primarily qualitative (subjective responses by participants). A brief mention of sales figures occurs on page 170 (not in the results or summary sections), and decrease in customer complaints is discussed as a favorable outcome. A portion of this case study does an excellent job using Kirkland's business partnership model, but the poor discussion of Level 3 Behaviors and poorer discussion of Level 4 Outcomes causes the case to end weakly.

## **Chapter 20**

### **Accident Reduction Program: Maryland Transit Administration**

This case was the strongest one that I studied, with an excellent executive summary describing issues in great detail, exploring various possible causes, and giving a 5-Goal targeted strategy for the program (p. 191-192). The author narrates the story of the stakeholders, introducing them and explaining the perspectives of the principle players while describing the history of the case through compelling details. (p. 191-192). The case makes connections to theoretical and empirical research by utilizing the Kirkpatrick Business Partnership Model as the foundation for planning, and designing the program, using all 4 Kirkpatrick Levels for evaluation, and adding a sort of LMS (dynamic training dashboard) to monitor and aid in the accumulation of evidence to answer important questions and give credence to conclusions. Thoughtful analysis begins in the executive summary and continues throughout the case, particularly in the Key Findings and Results section, which substantiates decisions and conclusions with facts and explanations. The team developed a variety of initiatives (from the Goals to the Project Methodology to the Required Drivers to the Evaluation Methodology) to address various levels of the issue, providing descriptive discussions of the decision-making process. Finally, the entire project was approached as a discovery process, setting the stage for evaluation and feedback beginning with the executive statement and continuing throughout the case. The team analyzed data (both quantitative and qualitative) to produce evidence of program success, discuss barriers, and give an effective summary, demonstrating the value of the training.