



## **Tactic #2: Producing a thorough Evaluation Plan**

CDI/STD Meeting, EASA, Nairobi-Kenya, 17-19 October 2016

Presenter: 'Nopi Linkonyane, ATNS-Aviation Training Academy, South Africa

## Scope of Presentation

- 1. An overview of “Producing a thorough Evaluation Plan” from the TRAINAIR PLUS Methodology (TDG) perspective;**
- 2. The importance of complying with the TDG methodology for best results;**
- 3. Challenges and why they are regarded as such: ATNS Case Study;**
- 4. Solutions and benefits of overcoming the challenges: ATNS Case Study;**
- 5. Conclusion: Best Practice(s)**

# 1. An overview of a thorough Evaluation Plan (TDG perspective)

## 1.1: The purpose of EVALUATION

- a. **To evaluate the effectiveness of the training** by determining if ALL the performance objectives have been accomplished to the required level of competency;
- b. **To diagnose any failures** in meeting the performance objectives and, where failures exist, to determine their causes;
- c. **To revise the training material** as required.

# 1. An overview of a thorough Evaluation Plan (TDG perspective)

## 1.1: The purpose of EVALUATION

- a. **To evaluate the effectiveness of the training** by determining if ALL the performance objectives have been accomplished to the required level of competency;
- b. **To diagnose any failures** in meeting the performance objectives and, where failures exist, to determine their causes;
- c. **To revise the training material** as required.

**1.2: PLANNING** is anticipatory decision-making about what needs to be done, how it has to done, and with what resources.

# 1. An overview of a thorough Evaluation Plan (TDG perspective)

## 1.1: The purpose of EVALUATION

- a. **To evaluate the effectiveness of the training** by determining if ALL the performance objectives have been accomplished to the required level of competency;
- b. **To diagnose any failures** in meeting the performance objectives and, where failures exist, to determine their **causes**;
- c. **To revise the training material** as required.

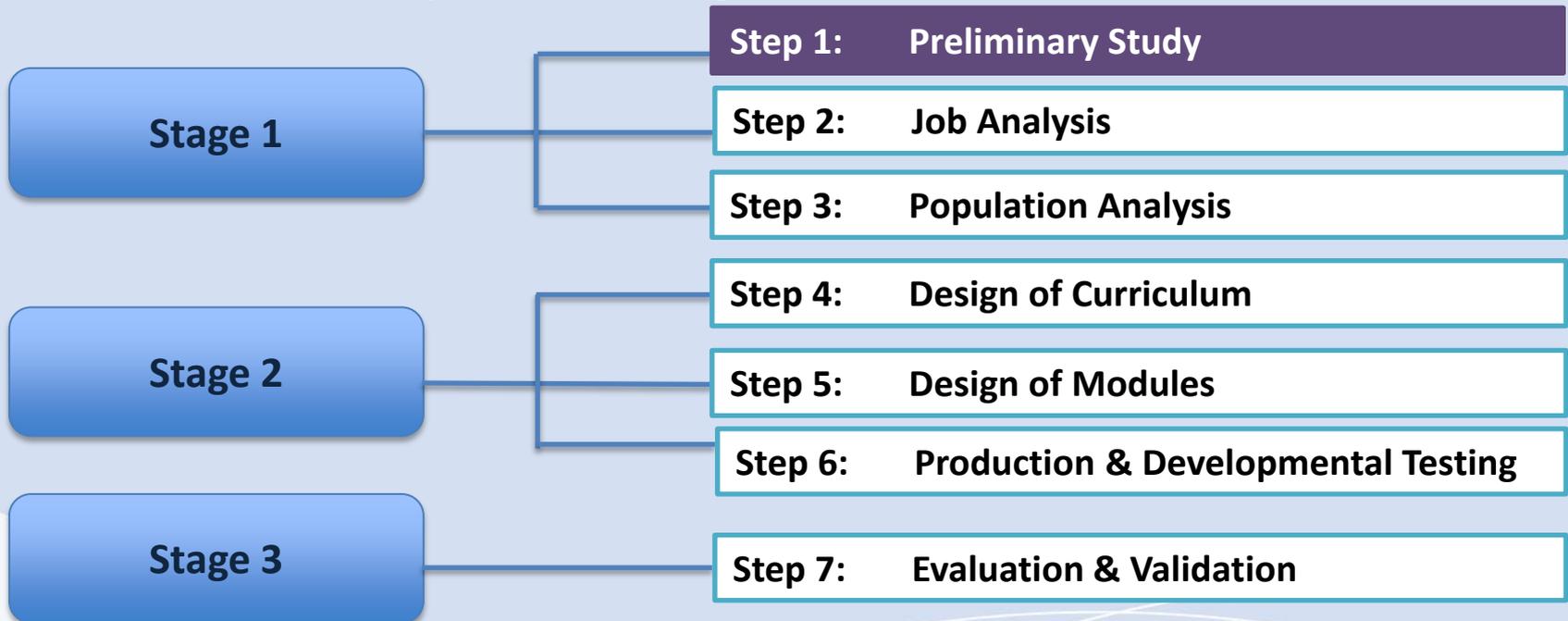
**1.2: PLANNING** is anticipatory decision-making about what needs to be done, how it has to done, and with what resources.

**1.3 An Evaluation PLAN is a roadmap** that specifies the kind of data needed to inform the decision (effectiveness of training). It identifies ways in which data will be collected, who will collect it, when and where will this data be collected, as well as how this data will be analysed.

# 1. An overview of a thorough Evaluation Plan (TDG perspective)

**1.3: A plan for evaluating the effect of training** on the organization's operational performance should be:

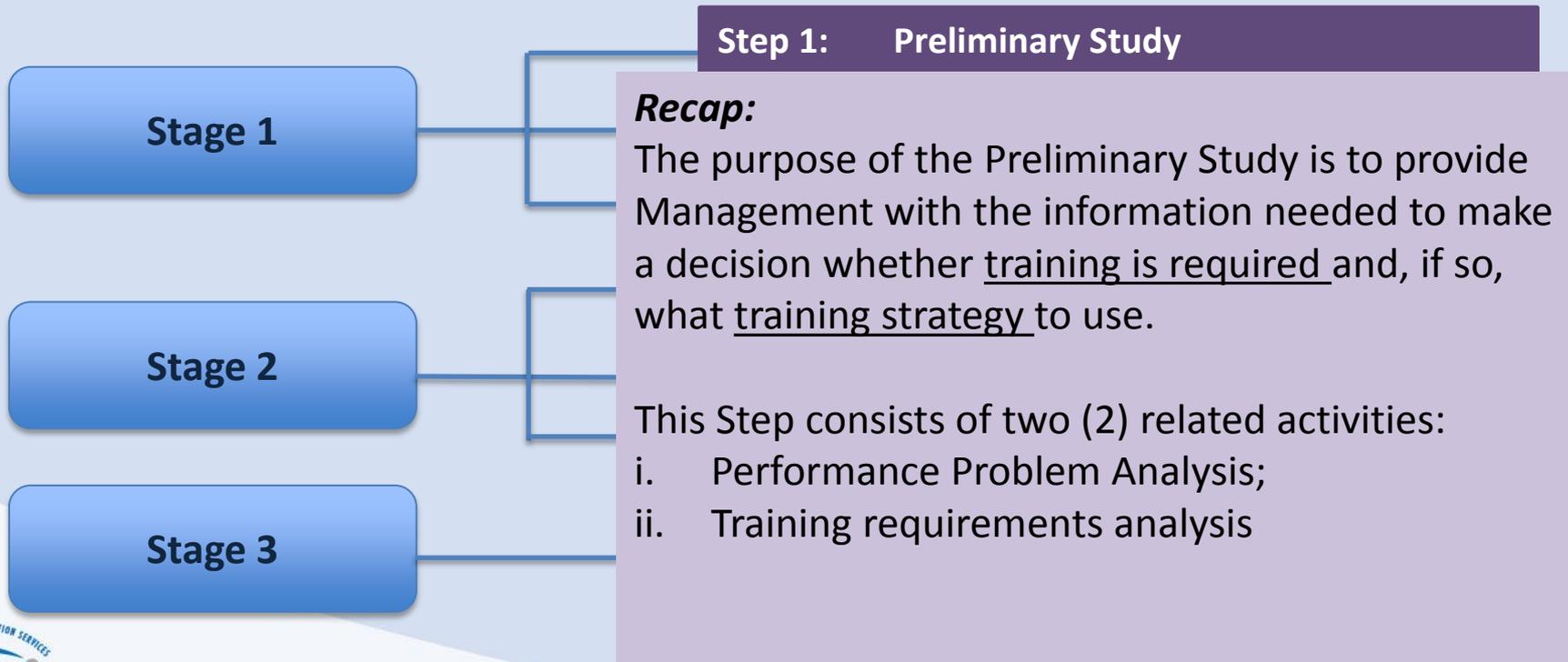
- **Prepared** at the end of the Preliminary Study and
- **Included in the report** for Management.



# 1. An overview of a thorough Evaluation Plan (TDG perspective)

**1.3: A plan for evaluating the effect of training** on the organization's operational performance should be:

- **Prepared** at the end of the Preliminary Study and
- **Included in the report** for Management.



# 1. An overview of a thorough Evaluation Plan (TDG perspective)

## 1.4: EVALUATION PLAN: [TDG Form 7]

STP No. & Title:		Methods						Dates:
Factors/ Aspects to be evaluated	Indicators (What is to be monitored)	Observations/ Interviews	Tests or Measurements	Questionnaires	Group Discussions	Reports	Operational Statistics	Who will carry out the evaluation?

# 1. An overview of a thorough Evaluation Pan (TDG perspective)

## 1.4.1: Factors/ Aspects to be evaluated

STP No. &  
Title:

Factors/  
Aspects to be  
evaluated

- The list should correspond to **SYMPTOMS** of the **PERFORMANCE Problem** identified during the **PRELIMINARY Study Step**;
- The identification or detection of a performance problem stems from some directly **observable** or **measurable** facts or events;
- Such facts or events are called **symptoms of a performance problem**;
- Examples are:
  - **Poor Productivity**;
  - **Poor Quality of service**;
  - **High Costs with low returns**;
  - **Poor Time Management, poor use of allocated time.**



# 1. An overview of a thorough evaluation plan (TDG perspective)

## 1.4.3: Methods

STP No. & Title:		Methods	Dates:
Factors/ Aspects to be evaluated	Indicators (What is to be monitored)	<ul style="list-style-type: none"><li>• Indicate which method will be used for <b>MONITORING</b> each <b>INDICATOR</b>:</li><li>• Examples are:<ul style="list-style-type: none"><li>➤ Observations;</li><li>➤ Interviews;</li><li>➤ Tests;</li><li>➤ Measurements;</li><li>➤ Questionnaires;</li><li>➤ Group Discussions;</li><li>➤ Reports;</li><li>➤ Operational Statistics</li></ul></li></ul>	

# 1. An overview of a thorough Evaluation Plan (TDG perspective)

## 1.4.4: Who will carry out the evaluation?

STP No. & Title:	Methods	Dates:
<ul style="list-style-type: none"><li>• Use this Section to record who will be responsible for the evaluation:</li><li>• Examples are:<ul style="list-style-type: none"><li>➤ Which Manager;</li><li>➤ Which Supervisor;</li><li>➤ Which Team Leader;</li><li>➤ Which OJTI; etc.</li></ul></li></ul>		<p>Who will carry out the evaluation?</p>

## 2. The importance of complying with TDG Evaluation Methodology

**2.1: We PLAN because we want to deliver quality service and programmes.**

- a. An Evaluation Plan helps us refine our data collection methods and Assessment Practices so that the information we gather will be useful;
- b. It promotes a culture of evaluation whereby relevant stakeholders are conscious of how to ensure that relevant information is gathered to improve training;

**2.2: The Evaluation Plan will give **Management** a tool for measuring the impact of the training project on the organization.**

**2.3: Usually, the evaluation of expected improvements in performance will be carried out some months **AFTER** training has been successfully completed.**

**2.4: This is known as **POST-TRAINING Evaluation** and it is a **Management Task**.**

## 3. The Challenges of designing an Evaluation Plan

### 3.1: The challenges of designing an Evaluation Plan that will yield results that can be measured against organizational Key Performance Indicators (KPIs)

**Challenge:** Using KPIs in the training and post-training evaluation;

**Issue:** Prior planning for post-training evaluation to measure training impact;

## 3. The Challenges of designing an Evaluation Plan

### 3.2: Group work:

Instructions: **20min**

#### Select a spokesperson to present

- a. Discuss the challenges and the tactic(s);
- b. Decide on solutions and best practices to execute the tactic(s);
- c. Discuss & present An Evaluation Plan based on organizational KPIs;

## 4. Best Practice for designing an Evaluation Plan

### 4.1: The ATNS-Aviation Training Academy's Case Study

#### Key Performance Indicators w.r.t. Quality Management Systems (Examples)

- i. Continually improving the management systems in support of ensuring continued compliance.
- ii. Evaluate the efficiency of the business system by prioritised safety and quality system related internal audits;
- iii. Regularly reviews the Quality Management System at which, appropriate measurable quality objects are established and reviewed;

# 4. Best Practice for designing an Evaluation Plan

## 4.1: The ATNS-Aviation Training Academy's Case Study

STP No. 311/067/QMS INT AUD Title: Quality Management System (QMS) Internal Auditors Course		Methods						Dates:
Factors/ Aspects to be evaluated	Indicators (What is to be monitored)	Observations/ Interviews	Tests or Measurements	Questionnaires	Group Discussions	Reports	Operational Statistics	Who will carry out the evaluation?
i. High number of CIRs raised (Continuous Improvement Reports) against the internal QMS auditors	Decrease in the number of CIRs raised against the internal QMS Auditors					✓	✓	<ul style="list-style-type: none"> <li>Senior Internal QMS Officer,</li> <li>Quality Management Representative (QMR),</li> </ul>

## 4. Best Practice for designing an Evaluation Plan

### 4.1: The ATNS-Aviation Training Academy's Case Study

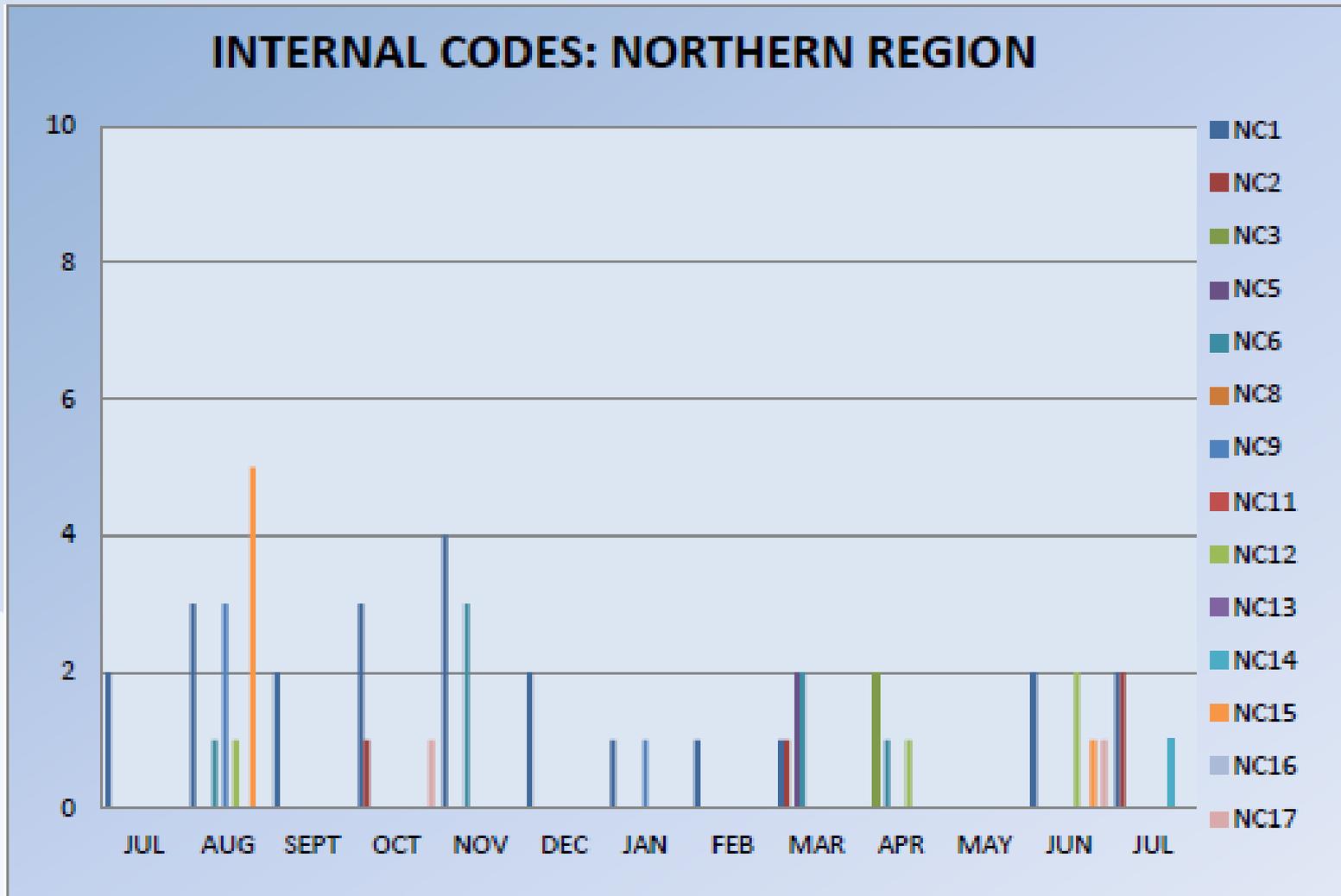
#### Sources of information for CIR:

- Monthly QMS Quality Reports by Central QMS Office;
- Report reflects codes for types of CIR issued;
- Examples:
  - NC1: Not following procedure;
  - NC2: Late submission of document;
  - NC3: Incomplete document

## 4. Best Practice for designing an Evaluation Plan

### 4.1: The ATNS-Aviation Training Academy's Case Study

Source: ATNS July Quality Report



## 5. Conclusion

### The ATNS-Aviation Training Academy's Case Study

1. **Some job descriptions are not properly written as a result it is difficult to identify performance problems for Stage 1 Step 1;**
2. **Some jobs are not aligned to the Policies and Procedures that are supposed to guide routine responsibilities. Therefore, it is difficult to identify performance problems and appropriate indicators;**
3. **In some instances there are no resources (HR) to monitor performance, e.g. there is:**
  - a. **One Quality Management Representative for the whole Organisation (24 Stations country-wide) and**
  - b. **Two LQR (Local Quality Representatives);**



# Contact us

## ATNS HEAD OFFICE

Postal address  
Private Bag X15  
Kempton Park  
1620

Street address  
Block C, Eastgate Office Park  
South Boulevard Road  
Bruma  
2198  
Gauteng  
Republic of South Africa

Contact details  
Tel: +27 11 607 1000  
Fax: +27 11 607 1570  
Website: [www.atns.com](http://www.atns.com)  
email: [marketing@atns.co.za](mailto:marketing@atns.co.za)

## THE AVIATION TRAINING ACADEMY

Postal address  
Private Bag X1  
Bonaero Park  
1622

Contact details  
Tel: +27 11 570 0400  
Fax: +27 11 395 3347