HRD 5308 Needs Assessment in HRD (21107)

Spring 2023

Department of Human Resource Development
Soules College of Business
The University of Texas at Tyler

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Instructor:	Dr. Yonjoo Cho (ycho@uttyler.edu), Professor
Class Time:	1/9 – 4/29 (Spring Break: Week of 3/13)
Orientation:	Week 1 (1/10 (Tue) at 7:00pm CST) via Zoom
Bi-weekly Meetings:	<mark>1/24, 2/7, 2/21, 3/7 & 3/21 (Tue) at 7:00pm</mark> (Other times by appointment)
Draft Presentation:	Week 14 (4/11 (Tue) at 7:00pm)
Communication:	Canvas, emails, Zoom, and Telephone (903-566-7260)
Course Access:	https://uttyler.instructure.com/courses/33772
Zoom:	https://uttlyer.zoom.us/my/yjcho

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COURSE DESCRIPTION

This course centers on concepts, cases, and practices of needs assessment in HRD. The identification of needs is a starting point for performance improvement in organizations. The process of conducting needs assessment has a greater impact on performance improvement by attending to the context in the organization. While needs assessment is preceded by needs analysis, due to the nature of the overlap of the two in small-scale class projects, the terms *needs assessment* and *needs analysis* will be used interchangeably in this course.

COURSE GOALS

The goals of the course include the following:

- To understand concepts, principles, and cases of needs assessment in organizations
- To learn how to use data collection and analysis methods and SWOT Analysis as a needs assessment method
- To carry out a needs assessment project by working with a real organization
- To learn the balancing act of individual and teamwork activities to fully grasp the gist of needs assessment in HRD

CORE COPMETENCIES

By the end of the semester, students will be able to:

- Identify performance needs in the organization through reading required readings, discussions of cases, and conducting a needs assessment project in teams.
- Learn and practice data collection (e.g., interviews & surveys) and analysis methods (e.g., content analysis & descriptive statistical analysis) and a needs assessment method (e.g., SWOT Analysis).
- Perform a needs assessment of a client organization: select a project topic and client, write a one-page proposal, collect and analyze data, use a SWOT Analysis as a final step of data analysis, create a final report, and present findings and recommendations to client.
- Develop communication skills from working with team members, the instructor, and clients, in order to become a *professional* needs analyst or needs assessor.
- Reflect on lessons learned from individual, teamwork, and class participation activities.

COURSE OUTLINE

See Figure 1 for a needs assessment process that students are required to follow throughout the semester:

Figure 1
The Needs Assessment Process
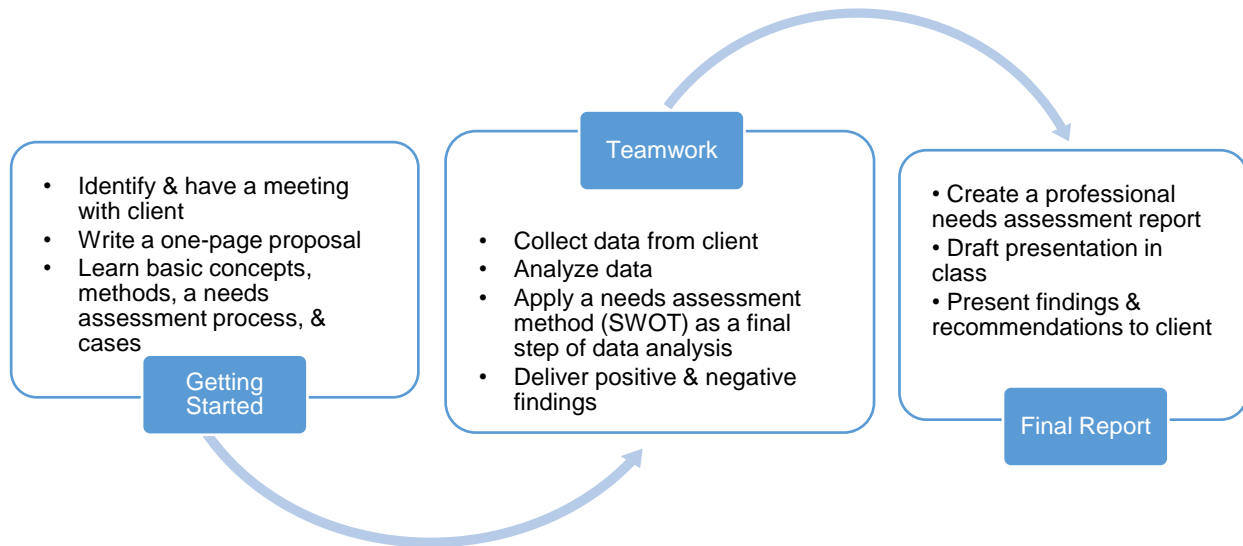
This course is composed of five units: introduction, basics, data collection, data analysis (SWOT Analysis as a final step), and synthesis (draft and final presentation and reflection).

Unit 1: Introduction
Understand the structure of this course: teamwork, instructor's expectations, assignments, grading policies, and ethical and professional considerations.

Unit 2: Basics
Develop a common understanding of basic concepts, underlying principles, and cases of needs assessment in HRD.

Units 3-4: Data Collection and Analysis
Learn and practice data collection and analysis methods required in a needs assessment process:

- Data collection (e.g., interviews & surveys) and analysis methods (e.g., content analysis & descriptive statistical analysis)
- SWOT Analysis as a final step of data analysis

Unit 5: Synthesis - Presentations and Reflection
Present project findings and recommendations in class (draft presentation) and to the client (final presentation):

- Present a draft report to class to gather feedback from classmates and me.
- Finalize a professional report based on feedback.
- Present findings and recommendations to client.

Write a reflection paper summarizing lessons learned from teamwork and class activities.

READ ME FIRST (Canvas Modules)

Begin each week by reading a Read Me First (Canvas Modules) that I will post by Saturday at 9:00am CST and that will guide you to the content and things to do in the following week.

Recorded mini lectures on APA formatting guidelines, postings, the needs assessment project process, client selection, SWOT Analysis, and final report will be embedded in Read Me First pages.

SYNCHRONOUS MEETINGS

Research on online teaching and learning (e.g., Garrison et al., 2000) indicates that students need synchronous meetings to feel *presence* in online classes, though the UT Tyler HRD MS program is fully online.

Garrison, D. R., Anderson, T., & Archer, W. (2000). Critical inquiry in a text-based environment: Computer conferencing in higher education. *The Internet and Higher Education*, *2*(2-3), 87-105. https://doi.org/10.1016/S1096-7516(00)00016-6

We will have bi-weekly meetings via Zoom (https://uttyler.zoom.us/my/yjcho) to be on the same page concerning assignments:

- Orientation in Week 1 (TBA)
- Bi-weekly meetings (TBA)
- Team clinic in Week 12 (TBA)
- Draft report presentation before final presentation to client in Week 14.

These synchronous meetings are optional, though highly recommended. After a meeting, I will provide a recorded Zoom session so that you can view whenever convenient. In these meetings, you may ask any questions related to course assignments and class activities. You may also contact me for a one-on-one meeting by appointment.

In a draft presentation meeting in Week 14, at least two students must be present. If you cannot make it for emergency reasons, please let me know in advance.

To determine the most convenient time for many students, I will administer a Qualtrics survey a week before the semester begins. This select time will be the meeting time throughout the semester.

INDIVIDUAL AND TEAM WORK

This course is composed of individual work (49%) and team project-based learning (51%) as many business courses are, so students are required to work in teams as well as individually. For teamwork:

- In the first week, post your introduction in Discussion (Canvas) to get to know other students and identify your team members to work in teams for a needs assessment project throughout the semester. In this project-based learning course, forming a quality team is a critical success factor; therefore, be proactive in finding the best team members for you!
- Form a team of three students based on common interests (e.g., HRD or HRM), proximity (e.g., the same time zone), and diversity (e.g., gender, learning style).
- Name your team for team building purposes. Be creative! 😊
- Set up ground rules for quality teamwork. To evaluate your teamwork, you will be asked to fill out a peer evaluation form (attached at the end of this syllabus) twice, at the mid-term and end of the semester. At the mid-term, visit your ground rules to refresh your teamwork. Based on your team contribution points (out of 20) that will be converted from your average teamwork score (out of 4), I will provide you with development advice, so that you can develop your teamwork throughout the semester.

CLIENT INVOLVEMENT

In this course, client involvement is high as they will be instrumental for students to apply what they learn in class to a real organization so that they can provide findings and recommendations at the end. I will ask your client to evaluate the quality of your project work: qualitative details and quantitative evaluation (10% of total project points) by the end of the week of your final presentation. Here are four recommended client selection criteria:

- Fit: Do your client's needs fit your need assessment project's objective?
- Accessibility: Is your client willing to work with you?
- Familiarity: Do you know your client a little bit, though not fully, to easily get started?
- Availability: Is your key contact person (major stakeholder) always available to assist you throughout?

You may choose a team member's employer. I highly encourage you to identify a client to work with as soon as you form a team.

FEEDBACK-BASED

My teaching philosophy is that students should strive for excellence through the instructor's continued developmental feedback; therefore, I am going to provide such feedback whenever needed. In the process, you will learn how to deliver quality assignments and improve writing as a master's student using the APA formatting guidelines as required in HRD. However, I have observed that many working students at UT Tyler do not have sufficient time to factor in my detailed feedback for the improvement of their assignments. To meet your needs within a limited time, I am going to give you one more opportunity to revise your assignment after receiving my first grade, if you desire to do so.

INSTRUCTOR EXPECTATIONS

Online courses are based on two-way communication between the instructor and students. I expect you to aim at achieving learning goals that meet the quality standards at the master's degree level. It is YOU who should take responsibility for achieving the learning goals and completing all assignments and class activities within the due dates. In each step of the process, I will be there to provide you with prompt, constant, and detailed feedback. If assignment guidelines are unclear to you, ask for clarification. If you do not understand my evaluation comments, which happen sometimes, ask for extra feedback until it makes sense. As this is one of my flagship courses that I have taught over the past decade, I hope that it will clearly set the right expectations for what to do (e.g., teamwork) and what not to do (e.g., freeride). The bottom line is to learn as intended so that you will become an informed HR practitioner in general and needs analyst or needs assessor in diverse contexts. To achieve this goal, please be willing to learn new competencies such as writing a one-page proposal, the SWOT Analysis, and APA writing style as well as how to be professional. A critical success factor is communication, communication, and communication!

ASSIGNMENTS AND DUE DATES

Student are required to complete four assignments: weekly discussion postings, a needs assessment project, class participation activities, and a reflection paper. Submit assignments **in word** unless there are specific guidelines. All assignments are due by **Sundays at 11:59 pm EST,** except weekly postings:

Assignment		Level	Point (%)	Due
Weekly Discussion Postings (10 pts x 8 wks)		Ind	80 (22)	Weeks 1 to 9 (minus Week 8) (1 Answer by Wed & 2 Comments by Fri)
Needs Assessment Project	1. Team ground rules (10)	Team	190 (51)	1/22
	2. Client Selection (10)			1/29
	3. One-page proposal (20)			2/5
	4. Permission letter (10)			2/12
	5. Progress report (20)			3/12
	6. SWOT Analysis (20)			3/26
	7. Draft Report (40) & Presentation (10)			4/9 Draft presentation (4/11)
	8. Client feedback on findings and recommendations			Week of 4/10
	9. Final Report (20) & transmission letter (10)			4/16
	10. Final presentation to client			Week of 4/17
	11. Client evaluation (20) (*Note:* I will solicit this for you!)			4/23
Class Participation Activities	Your introduction (10)	Ind	80 (22)	1/11
	Discussion lead (20)			(Your choice)
	Team contributions: Mid-term & final peer-evaluation (20x2)			2/26 & 4/23
	Class evaluation (mid-term) (10)			2/26
Reflection Paper		Ind	20 (5)	4/23
Total			370 (100)	

Weekly Discussion Postings (80 pts)

You will concentrate on understanding concepts and principles of needs assessment in the first half of the semester through reading two required readings, except the first two weeks. Each week, I will post a discussion question on Canvas Discussion, and a discussion leader of a discussion group will lead the week's discussion.

Post one compact and pointed answer within a short paragraph by the end of **Wed** and two comments on other students' answers by the end of **Fri**. This assignment is worth 10 points each week: 6 points for an answer and 4 (2x2) points for two comments. See the following samples of "compact and pointed answer within a short paragraph":

Discussion question: How do you define needs assessment in your own words?

Sample answer: Needs assessments may lead to a variety of results that can involve training, development, or some non-traditional solutions (Rossett, 2009). The reason for this is that the unsatisfactory portion that is being assessed is oftentimes challenging to address as there can be little information or direction in mind when the assessment begins (Sleezer et al., 2014). Therefore, a needs assessment is a process of addressing an unsatisfactory portion of an existing system in order to solve or reduce the aforementioned unsatisfactory portion (quoted from Charles Stone, 2022).

From the second week on, a discussion leader of a discussion group will lead the week's discussion. Choose a week to play a discussion lead role and write down your choice on google docs that will be provided. Discussion lead is an excellent opportunity to manage a week's discussion so that you learn how to deepen your knowledge on the week's topic and to ask probing questions to engage students in in-depth discussion. This assignment has been highly valued by students in previous years. To complete this assignment:

- Read all required and optional readings.
- Read all your discussion group members' postings.
- Respond to interesting or intriguing postings and provide thoughtful feedback and/or ask probing questions for in-depth discussion.
- To earn the full 20 points, you must be present throughout the week of your choice, for a minimum of three days.

In the process of weekly discussions, students will better understand the concepts and principles of needs assessment and develop critical thinking skills accordingly. I will provide feedback on your postings if you did not meet the posting requirements after the first due date (Wed), so that you can revise your answers by the second due date (Fri). I suggest you post your answer and two comments early so that you can be active in discussion with others. I also suggest you do not add References at the end of your short answer unless there are new readings cited, just to save space (see **Appendix 1** for the postings rubric).

Needs Assessment Project (190 pts)

Work in teams. This final project is a great opportunity to apply the concepts, principles, and a SWOT Analysis you learned to a real organization. To that end, work through the following steps:

- For a team of three students, name your team, and set up the team ground rules (see **Appendix 2** for the team ground rules sample).
- Select a client who is interested in working with you to assess performance needs in the organization. Your client can be a profit or non-profit organization, university unit, school, small startup, or the military. For effective communication, choose an organization that is willing to collaborate with you throughout. You may choose your own organization.
- In an initial meeting with your client, identify the organization's performance needs, gather background information, and select a project topic. In this meeting, you should clarify what you can do and what not (called "frame factors") to clearly set the same expectations for both parties. In other words, don't be too ambitious, particularly in this Covid-19 pandemic.
- Based on the information gathered from the initial meeting, write a **one-page proposal** in which you will clearly state the project title, purpose, background (context), key stakeholders from whom you will collect data, frame factors limiting the scope of the project, the data collection and analysis process, a (tentative) schedule (milestones) and division of labor concerning who will be doing what (see **Appendix 3** for the one-page proposal rubric and **Appendix** 4 for the one-page proposal sample).
- As a one-page proposal will serve as an informal contract for your client, I suggest you make it **professional**, which means that you must include all key elements to plan a needs assessment process in detail as much as possible. If your first submission does not meet my expectations, you will have one more opportunity to revise it. You will share the final proposal with your client so that you can receive a signed permission letter from your client (see **Appendix 5** for the permission letter sample).

- Follow the ensuing steps detailed in the proposal. Collect data using qualitative (e.g., interviews) and quantitative (e.g., surveys) data collection methods and analyze the data using qualitative (e.g., content analysis) and quantitative (e.g., descriptive statistics) methods for triangulation. The ideal is: the more data, the better credibility.
- Use a **SWOT Analysis** as the final step of data analysis and deliver findings and recommendations.
- Write a single-spaced, ten-page **draft report**, except appendices and references. The key components of the final report include:

1. Cover includes a project title, the course title, submission date, and team member names.
2. (1-page) Executive Summary outlines the report.
3. Acknowledgements include all key stakeholders' full names to express apprecaition for their assistance.
4. Table of Contents includes the main body, appendices, and references with page numbers. Do not add the front matter (Executive Summary and Acknowledgements)!
5. Introduction (p. 1) includes the purpose statement (scope), information about the context (background and problem) and frame factors (project-, organization-, and consultant-wise). The main page numbering begins on this page.
6. Project Methodology includes the data collection and analysis process. A literature review on the project topic is the first step to follow before collecting data.
7. **SWOT Analysis** as the final step of data anlaysis includes **internal** strengths and weaknesses and **external** opportunities and threats. You will provide a figure of SWOTs listing bullets in four cells.
8. Findings include positives (strengths) and negatives (areas for improvement). Number findings consecutively as in Finding 1, Finding 2. . . Finding 10 that will be referred to in Recommendations.
9. Recommendations include implementation steps and critical success factors. Each recommendation should refer to related findings to provide evidence.
10. Appendices include extra information you developed as in Appendix A: One-Page Proposal and Appendix B: Permission Letter.
11. References will be located at the end to evidence that you reviewed the literature on the project topic.

In **Week 14**, teams are scheduled to present a draft report via Zoom and receive feedback from me and classmates. This has been extremely helpful for students as they can do a rehearsal before a final presentation to their client and to see how other teams are doing. After the draft presentation is over, teams are required to ask for their client's feedback on findings and recommendations (and not the entire report!), finalize the draft report based on feedback, submit the final report to me and the client (due: April 16), and present findings and recommendations to the client as scheduled in the week of April 17. The **final report** should be written in a compact, pointed, and professional manner so that your client can easily understand (see **Appendix 6** for the final report rubric).

The project report will be evaluated for criteria including: (a) inclusion of all key elements of the report, (b) organization and logical flow, (c) clarity, (d) consistency (e.g., design considerations), (e) professional outlook (e.g., appropriate visuals on the cover page, no running text), and (f) attention to detail (e.g., APA). Final report samples are available on Canvas Files.

At the end of the semester, I will ask for client evaluation (20 pts.) on the quality of your final report and presentation as well as teamwork (see **Appendix 7** for the client feedback sample).

Class Participation Activities (80 pts)

Actively participate in class activities including: (a) introduce yourself, (b) lead a discussion, (c) fill out a peer evaluation form twice (mid-term and final) which will be converted to your team contribution points (out of 20) (see **Appendix 8** for the peer evaluation form), and (d) evaluate the class (mid-term).

Reflection Paper (20 pts)

Write a single-spaced, three-page reflection paper. This end-of-class reflection paper should include lessons learned from class activities and a semester-long needs assessment project. Key elements include: (a) a title, purpose, and introduction, (b) key points of lessons learned from class activities and the project process, and (c) the conclusion with suggestions.

FINAL GRADES

Grade	A	B	C	D	F
Range	Over 90%	90% to 80%	80% - 70%	70% to 60%	Less than 60%
Range (pts)	Over 333	332-296	295-259	258-222	Below 222

GRADING GUIDELINES

See Assignment Guidelines on Canvas to ensure that you understand evaluation criteria before beginning an assignment. No incompletes will be awarded unless there is an emergency (e.g., positive on a COVID test). In case of a late submission, there will be one point subtracted from your grade per day. To receive no penalty for late submission, you must inform me of the reasons why you need an extension or incomplete in advance.

COURSE POLICIES

Late Work
No credit will be given for late assignments unless the student's provider and/or UT Tyler's system prevents the student from submitting a discussion post, assignment, or quiz. The student is responsible for contacting the instructor, providing evidence of submitting any missed work within 24 hours.

Academic Dishonesty Statement
The faculty expects from students a high level of responsibility and academic honesty. Because the value of an academic degree depends upon the absolute integrity of the work done by the student for that degree, it is imperative that a student demonstrates a high standard of individual honor in his or her scholastic work.

Scholastic dishonesty includes, but is not limited to, statements, acts or omissions related to applications for enrollment of the award of a degree, and/or the submission, as one's own work of material that is not one's own. As a general rule, scholastic dishonesty involves one of the following acts: cheating, plagiarism, collusion and/or falsifying academic records. Students suspected of academic dishonesty are subject to disciplinary proceedings.

University regulations require the instructor to report all suspected cases of academic dishonesty to the Dean of Students for disciplinary action. In the event that disciplinary measures are imposed on the student, it becomes part of the students' official school records. Also, please note that the handbook obligates you to report all observed cases of academic dishonesty to the instructor.

Plagiarism will not be tolerated, and learners should be aware that all written course assignments will be checked by plagiarism detection software. Violations of academic integrity will be reported and processed according to the guidelines established by the University.

UNIVERSITY POLICIES
Information is available on the Canvas Syllabus.

COLLEGE OF BUSINESS STATEMENT OF ETHICS

The ethical problems facing local, national and global business communities are an ever-increasing challenge. It is essential the Soules College of Business help students prepare for lives of personal integrity, responsible citizenship, and public service. In order to accomplish these goals, both students and faculty of the College of Business at UT Tyler will:

- Ensure honesty in all behavior, never cheating or knowingly giving false information.
- Create an atmosphere of mutual respect for all students and faculty regardless of race, creed, gender, age or religion.
- Develop an environment conducive to learning.
- Encourage and support student organizations and activities.
- Protect property and personal information from theft, damage, and misuse.
- Conduct yourself in a professional manner both on and off campus.

RESOURCES

APA Formatting Guidelines
In any workplace, writing well in a compact and pointed way is highly encouraged as it is a way to effectively communicate your ideas in the organization, along with speaking and presenting. In this course, you must follow the APA (2020):

American Psychological Association. (2020). *Publication manual of the American Psychological Association: The official guide to APA style* (7th ed.). American Psychological Association.

in all writing assignments as it is required in the UT Tyler HRD MS degree program. Follow the basics of APA on Canvas Files and see how I referenced publications in this syllabus. You will learn how to write well in a compact and pointed way at the end, as APA is not just about editing but also about organizing ideas.

Contacts
Business Librarian at UT Tyler Sarah Norrell (snorrell@uttyler.edu) is resourceful to search HRD publications. You may also ask for help from Beth Hyatt (bhyatt@patriots.uttyler.edu), a UT Tyler HRD Ph.D. student, concerning HRD topics.

HRD Masterclass Podcast Series (hrdmasterclass.com)
The Academy of Human Resource Development (AHRD), which is the premier organization in HRD, has published several podcast series that explore the fundamentals and different aspects of HRD. Each episode includes a one-to-one interview with a guest, as well as a group discussion where two to three guests discuss their shared interest in the episode topic. This is an outstanding resource to understand the most current topics and foundations of HRD.

TEXTBOOKS

No textbook is required. Journal articles and book chapters are available via Canvas (Files).

Recommended:

Morgan, G. (2006). *Images of organization* (updated edition). SAGE.
Rossett, A. (2009). *First things fast: A handbook for performance analysis* (2nd ed.). Pfeiffer.
Russ-Edt, D. F., & Sleezer, C. M. (2020). *Case studies in needs assessment*. SAGE.
Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014). *A practical guide to needs assessment* (3rd ed.). Wiley.

CASES

Case 1:
Stefaniak, J. E., Mi, M., & Afonso, N. (2015). Triangulating perspectives: A needs assessment to develop an outreach program for vulnerable and underserved populations. *Performance Improvement Quarterly*, *28*(1), 49-68. https://doi.org/10.1002/piq.21186

Case 2:
Aull, J., Bartley, J., Olson, C., Weisberg, L., & Winiecki, D. (2016). Lesson learned while completing a needs assessment of ITSS, Inc. career development opportunities: A case study. *Performance Improvement Quarterly*, *28*(4), 7-26. https://doi.org/10.1002/piq.21207

Case 3:
Mills, E., & Stefaniak, J. (2020). A needs assessment to align perspectives for the career needs of international students. *Performance Improvement*, *59*(9), 6-14. https://doi.org/10.1002/pfi.21936

Case 4:
Swart, W. (2021). Academic needs assessment: Continual improvement for academic units. *Performance Improvement*, *60*(1), 19-24. https://doi.org/10.1002/pfi.21950

Case 5:
Cho, Y., & Brown, C. (2013). Project-based learning in education: Integrating business needs and student learning. *European Journal of Training and Development*, *37*(8), 744-765. https://doi.org/10.1108/EJTD-01-2013-0006

REQUIRED READINGS

Week 1 (1/9 - 1/15) – Introduction

Parker, G. M. (2006). What makes a team effective or ineffective? In J. V. Gallos (Ed.), *Organization development* (pp. 656-680). Jossey-Bass.

Week 2 (1/16 - 1/22) – Basics 1 (*Note*: Two book chapters of Sleezer et al. (2014) are integrated into one reading.)

Rossett, A. (2009). Tales from the trenches. In *First things fast: A handbook for performance analysis* (2nd ed.) (pp. 203-239). Pfeiffer.
Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014a). Overview of needs assessment. In *A practical guide to needs assessment* (3rd ed.) (pp. 15-33). Wiley.
Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014b). Ideas and models that guide practice. In *A practical guide to needs assessment* (3rd ed.) (pp. 35-49). Wiley.

Week 2 – Optional

ATD Research. (2018). *Needs assessments: Design and execution for success* (White Paper). https://www.td.org/research-reports/needs-assessments

Week 3 (1/23 – 1/29) – Basics 2

Altschuld, J. W. (2004). Emerging dimensions of needs assessment. *Performance Improvement*, *43*(1), 10-15. https://doi.org/10.1002/pfi.4140430104
Ruff-Eft, D. F., & Sleezer, C. M. (2020). Lessons learned. In D. F. Russ-Eft & C. M. Sleezer (Eds.), *Case studies in needs assessment* (pp. 280-288). SAGE.

Week 4 (1/30 – 2/5) – Ethical Issues

Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014). Dealing with ethical issues. In *A practical guide to needs assessment* (3rd ed.) (pp. 257-269). Wiley.

Stefaniak, J. E., Mi, M., & Afonso, N. (2015). Triangulating perspectives: A needs assessment to develop an outreach program for vulnerable and underserved populations. *Performance Improvement Quarterly*, *28*(1), 49-68. https://doi.org/10.1002/piq.21186

Week 4 – Optional

Russ-Eft, D. (2018). Second time around: AHRD Standards and Ethics and Integrity. *Human Resource Development Review*, *17*(2), 123-127. https://doi.org/10.1177/1534484318772123

Week 5 (2/6 – 2/12) – Data Collection and Analysis

Aull, J., Bartley, J., Olson, C., Weisberg, L., & Winiecki, D. (2016). Lesson learned while completing a needs assessment of ITSS, Inc. career development opportunities: A case study. *Performance Improvement Quarterly*, *28*(4), 7-26. https://doi.org/10.1002/piq.21207
Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014). Strategies for collecting and analyzing data. In *A practical guide to needs assessment* (3rd ed.) (pp. 51-85). Wiley.

Week 5 – Optional

Marrelli, A. F. (2010). Data collection. In R. Watkins & D. Leigh (Eds.), *Handbook of improving performance in the workplace, vol. 2: Selecting and implementing performance interventions* (pp. 792-816). ISPI.

Week 6 (2/13 – 2/19) – Interviews

Mills, E., & Stefaniak, J. (2020). A needs assessment to align perspectives for the career needs of international students. *Performance Improvement*, *59*(9), 6-14. https://doi.org/10.1002/pfi.21936
Russ-Eft, D. & Preskill, H. (2009). Individual and focus group interviews. In *Evaluation in organizations: A systematic approach to enhancing learning, performance, and change* (2nd ed.) (pp. 313-343). Basic Books.

Week 6 – Optional

Gilmore, E. R. (2006). Using content analysis in human performance technology. In J. A. Pershing (Ed.), *Handbook of human performance technology* (3rd ed.) (pp. 819-836). Pfeiffer.
Lester, J., Cho, Y., & Lochmiller, C. (2020). Learning to do qualitative data analysis: A starting point. *Human Resource Development Review*, *19*(1), 94-106. https://doi.org/10.1177/1534484320903890
Rabionet, S. E. (2011). How I learned to design and conduct semi-structured interviews: An ongoing and continuous journey. *The Qualitative Report*, *16*(2), 563-566. https://doi.org/10.46743/2160-3715/2011.1070

Week 7 (2/20 – 2/26) – Surveys

Russ-Eft, D. & Preskill, H. (2009). Survey and questionnaires. In *Evaluation in organizations: A systematic approach to enhancing learning, performance, and change* (2nd ed.) (pp. 265-311). Basic Books.
Swart, W. (2021). Academic needs assessment: Continual improvement for academic units. *Performance Improvement*, *60*(1), 19-24. https://doi.org/10.1002/pfi.21950

Week 7 - Optional

Artino, A., La Rochelle, J. S., Dezee, K. J., & Gehlback, H. (2014). Developing questionnaires for educational research: AMEE Guide No. 87. *Medical Teacher*, *36*, 463-474. https://doi.org/10.3109/0142159X.2014.889814
Dillman, D. A., Smyth, J. D., & Christian, L. M. (2009). *Internet, mail, and mixed-mode surveys: The tailed design method* (3rd ed.). John Wiley & Sons, Inc.

Thomas, M. N. (2006). Quantitative data analysis. In J. A. Pershing (Ed.), *Handbook of human performance technology* (3rd ed.) (pp. 837-872). Pfeiffer.

Week 8 (2/27 – 3/5) – Cho's participation in the 2023 AHRD Conference in Minneapolis (no class)

Week 9 (3/6 – 3/12) – A Needs Assessment Method: SWOT Analysis

Cho, Y., & Brown, C. (2013). Project-based learning in education: Integrating business needs and student learning. *European Journal of Training and Development*, *37*(8), 744-765. https://doi.org/10.1108/EJTD-01-2013-0006

Leigh, D. (2010). SWOT analysis. In R. Watkins & D. Leigh (Eds.), *Handbook of improving performance in the workplace, Vol. 2: Selecting and implementing performance interventions* (pp. 115-140). ISPI.

Week 9 - Optional

Chermack, T. J., & Kasshanna, B. K. (2007). The use and misuse of SWOT analysis and implications for HRD professionals. *Human Resource Development International*, *10*(4), 383-399. https://doi.org/10.1080/13678860701718760

HRD 5308 COURSE SCHEDULE (May change depending on the circumstances)

Unit	Week	Topic	Reading	Assignment/Activity
U1 (Intro)	1 (1/9-1/15)	Introduction Orientation	Parker (2006)	Introduce yourself (due: 1/11) Discussion 1 (Wed & Fri) Team formation (1/15)
U2 (Basics)	2 (1/16-1/22)	Basics 1	Rossett (2009); Sleezer et al. (2014a, 2014b)	Discussion 2 Team ground rules (1/22)
	3 (1/23–1/29)	Basics 2	Altschuld (2004); Russ-Eft & Sleezer (2020)	Discussion 3 Client selection (1/29)
	4 (1/30–2/5)	Ethical Issues Case 1	Sleezer et al. (2014); Stefaniak et al. (2015)	Discussion 4 One-page proposal (2/5)
U3 (Data Collection)	5 (2/6–2/12)	Data Collection & Analysis Case 2	Aull et al. (2016); Sleezer et al. (2014)	Discussion 5 Permission letter (2/12)
	6 (2/13–2/19)	Interviews Case 3	Mills & Stefaniak (2020); Russ-Eft & Preskill (2009)	Discussion 6
	7 (2/20-2/26)	Surveys Case 4	Russ-Eft & Preskill (2009); Swart (2021)	Discussion 7 Mid-term evaluation (peer & class) (2/26)
	8 (2/27–3/5)	Cho's Participation in 2023 AHRD Conference in Minneapolis (no class)		
U4	9 (3/6-3/12)	NA Method: SWOT Analysis Case 5	Cho & Brown (2013); Leigh (2010)	Discussion 9 Progress report (3/12)
	10 (3/13-3/19)	Spring Break (no class)		

(Data Analysis)	11 (3/20–3/26)	Findings & Critical Success Factors Draft Presentation: Guidelines	SWOT Analysis (draft) (3/26)
	12 (3/27–4/2)	Team Clinic	
U5 (Synthesis)	13 (4/3–4/9)	Project Work	Draft report & presentation file (4/9)
	14 (4/10-4/16)	Draft Presentation (4/11 at 7:00pm) Final Submission to me and client	• Ask for client feedback on findings and recommendations • Final report & transmission letter (4/16)
	15 (4/17–4/23)	Final Presentation to client	Client evaluation (4/23) Final peer evaluation (4/23) Reflection paper (4/23)
	16 (4/24–4/29)	Reflection	Course evaluation

Appendix 1: Weekly Discussion Postings

Rubric

Evaluation Criteria	Rating		
	Excellent	Needs Work	Unsatisfactory
Meeting two deadlines (Wed & Fri)	Posts (an answer and two comments) were posted by the two deadlines	One of the posts was posted after the deadline	Posts were posted after the deadline, or posts were missing/not submitted
Citing one or two required readings in the week's answer	Required readings were cited in the week's answer	Only one of the required two readings was cited or none were cited in the week's answer	Neither of the required two readings were cited in the week's answer, or posts were not submitted
Writing in a compact and pointed way and following the APA style (7th ed.)	Writing followed the APA style and was compact and pointed within a short paragraph	Writing did not follow the APA or was not compact and pointed within a short paragraph	Writing did not follow the APA style and was not compact and pointed, or posts were not submitted

Appendix 2: Team Ground Rules Sample

Team Name: Team Needy
Members: Robert Pierce, Karen Carson, Alexandria (Grace) Motley
Team Leader: Robert Pierce

Purpose: The mission of Team Needy is to collaborate and apply critical thinking skills as a team to practice and apply the design and overall development of a needs assessment report through the guidance of Dr. Cho. Team Needy will brainstorm, communicate effectively, and share creative ways to apply critical thinking to the needs assessment process and report.

Weekly Meetings: Zoom meetings will be held once per week at 8:00 p.m. CST every Thursday for the duration of the Spring 2022 semester.

Documents: Microsoft Word will be used to create, store, and collaborate content related to the team project. The team lead will submit all team assignments and documents by or before the due date assigned to Dr. Cho.

Communication Between Group Members: A GroupMe chat room is utilized to send and receive text message-style communication 24/7, so that team members may be in constant contact.

Communication with Professor: When contact with Dr. Cho is required, the group will reach a consensus on an official message sent by the team leader through Canvas, Patriot email, or Zoom during office hours. The team leader will then disburse appropriate feedback to the team members.

Participation: Each member will actively participate. If a team member must miss a meeting, communication will occur as soon as possible. All group members must be flexible and respectful of time. The breakdown of responsibilities for each team member and expected completion time will be decided no less than one week before the due date of each assignment.

Consensus and Disagreements: All decisions will be reached as a group; We commit to reaching an agreement, by all three team members, before submitting any academic material. Group members must listen when there is disagreement, understand and respect each other's point of view, and resolve the conflict with each team member's decision. We shall respect diversity in each member's thoughts, opinions, and beliefs with openness and inclusivity. If the team is unable to reach a consensus, we will utilize a voting system to reach a final decision or course of action. Should our team incur irreconcilable differences during this course, Dr. Cho will be contacted as an arbitrator to provide guidance and support to reach a final decision and or consensus.

Appendix 3: One-Page Proposal

Rubric

	Excellent	Needs Work	Unsatisfactory
Key Elements	All key elements are included: title, purpose (one sentence), context (problem statement), key stakeholders, frame factors (the scope of the project), data collection & analysis (the more the better), and schedules and division of labor (the more specific the better).	One or two of the key elements is/are missing: title, purpose (one sentence), context (problem statement), key stakeholders, frame factors (the scope of the project), data collection & analysis (the more the better), and schedules and division of labor (the more specific the better).	Two or more of the key elements are missing: title, purpose (one sentence), context (problem statement), key stakeholders, frame factors (the scope of the project), data collection & analysis (the more the better), and schedules and division of labor (the more specific the better).
Being Thorough	Proposal is thorough. It gives an excellent idea about the project and how the team will conduct it.	Proposal is mostly thorough. It gives a good idea about the project and how the team will conduct it. Needs more details to be thorough.	Proposal is not thorough. It does not give an idea about the project and how the team will conduct it. Needs much more details to be thorough.
Page Limit	The proposal is written in one page as required.	The proposal is a bit longer than one page, violating the requirement.	The proposal is more than one page, violating the requirement.
Revisions	No revision is required after the initial submission of the proposal.	One revision is required after the initial submission of the proposal.	More than one revision is required after the initial submission of the proposal.
Language	Language is pointed, clear and free of typos and/or grammar mistake(s).	Language is mostly pointed, clear, and includes only a few typos and/or grammar mistakes.	Language is not pointed, clear, and includes several typos and/or grammar mistakes.

Appendix 4: One-Page Proposal Sample

Needs Assessment on the Hiring Process at DWFS

Purpose: This needs assessment project aims to identify gaps in the hiring process at Dynamic Workforce Solutions (DWFS) and to recommend solutions for the future.

Rationale: DWFS is committed to providing Extreme Customer Service to internal and external customers. Identifying gaps and implementing change management initiatives in our process will help us maintain value and commitment to our customers.

Key Stakeholders: Includes the DWFS Human Resource team, which comprises of 4 members, accompanied by 5 hiring managers from our project in Deep East Texas.

Frame Factors: Internal factors include scheduling meeting times and potential for internal bias. External factors include the lack of in-person availability and the ongoing pandemic.

Data Collection and Analysis Methods:

- Literature review on current hiring practices in HR organizations.
- Document review of DWFS pre-assessments, core value screen, and interview guides.
- Interviews with DWFS HR Team, hiring managers, and Nancy Kantoff.
- Create a survey and administer it to the human resource team and hiring managers.
- Content analysis of the interview data.
- Descriptive statistical analysis of the survey data.
- SWOT analysis as the last step of data analysis.

Tentative Project Schedule and Division of Labor:

Major Task	Due Date	Leader
Team Ground Rules	1/23	Robert
Client Selection	1/30	Karen
Initial Client Meeting	2/1	Team Needy
One-Page Proposal	2/6	Grace
Permission Letter	2/13	Karen

Data Collection:
   a. Literature Review
   b. Document Review
   c. Interviews
   d. Surveys
	
	2/16
	2/23
	3/2
	3/9
		
		Robert
		Robert
		Karen
		Grace

Data Analysis:
   a. Content analysis of the interview data
   b. Descriptive statistical analysis of the Survey data
   c. SWOT Analysis (draft)
	
	3/16
	3/23
	3/27
		
		Karen
		Grace
		Robert

Progress Report	3/20	Team Needy
Draft Report and Presentation	4/10 & TBA	Team Needy
Solicit Client Feedback on Findings & Recommendations	Week of 4/11	Karen
Final Submission of Report & Transmission Letter	4/17	Robert
Final Presentation to Client	Week of 4/18	Team Needy

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13710 Dunnings Hwy | P.O. Box 373 | Claysburg, PA 16625

February 22, 2021

Team Tyler
c/o Alexis Puz
198 Peary Circle
Cresson, PA 16630

Dear Team Tyler:

I am writing to request assistance with conducting a needs assessment on behalf of NPC Inc. surrounding its Security Clearance Training Program.

NPC Inc. desires to work with Team Tyler through a needs assessment that is intended to identify opportunities to enhance our Security Clearance Training Programs that, when implemented, will improve the overall security knowledge of our supervisors and managers directly involved in the security clearance process. A critical element in this assessment is to ensure the "Why" is implicitly understood.

I give Team Tyler permission to use NPC, Inc.'s name in its final report. I anticipate that this report will be delivered to my attention by April 19, 2021.

I look forward to collaborating with Team Tyler on this important initiative. Please do not hesitate to contact me at (814) 239-1116 with any questions or desired discussion.

Sincerely,

Sherri L. Steward
Director of Human Resources

Appendix 6: Needs Assessment Report

Rubric

Criteria	Rating			
	Excellent	**Good**	**Needs Improvement**	**Unsatisfactory/ No Submission**
Required Elements of the Report - *Did you include all key elements of the final report?*	The report includes all required elements: cover page with title, executive summary, acknowledgements, table of contents; main body (introduction, data collection & analysis, findings & recommendations), appendices, and references.	The report includes all but one or two of required elements listed.	The report includes all but two or more of the required elements listed.	The report does not include many required elements listed.
Organization and Logical Flow - *Is the report well-organized? Does it have a logical flow?*	The report is well-organized, and ideas logically flow. Writing demonstrates an understanding of the data obtained from all sources.	The report is adequately organized, and ideas are arranged reasonably. Writing demonstrates an understanding of the data obtained from all sources.	The report is somewhat organized, and ideas do not flow well. Writing does not demonstrate an understanding of the data obtained from all sources.	The report lacks logical organization. Writing does not demonstrate any understanding of the data obtained from all sources. Or the report is not submitted.
Clarity - *Is the report written in ways that clients can easily understand?*	The report is well written, clear, free from grammar and spelling errors. Ideas are clearly stated for clients to easily understand.	The report shows above average quality and clarity in writing. There are minor errors in grammar and spelling. Ideas are mostly well-stated for clients to understand.	The report shows an average quality writing. There ae some errors in grammar and spelling. Most ideas are not well-stated for clients to understand.	The report shows a below average writing quality. There are frequent errors in spelling and grammar. Ideas are not stated for clients to understand. Or the report is not submitted.
Consistency - *Is there a right match between project goals and methods used?*	Methods used are appropriate to the project goal, are well-grounded in the literature, and allow for achieving the project goal.	Methods used are mostly appropriate to the project goal, are grounded in the literature for the most part and allow for achieving the project goal somewhat.	Methods used are not appropriate to the project goal. Methods are not grounded in the literature and do not allow for achieving the project goal.	Methods used are not appropriate, are not grounded in the literature, and do not allow for achieving the project goal.
Professional Outlook – *Is the report created in a professional manner?*	The report is created in a professional manner so that it effectively communicates content with the balancing act of text and visuals.	The report is appropriately created in a professional manner so that it communicates content with the balancing act of text and visuals.	The report is somewhat created in a professional manner so that it somewhat communicates content with the balancing act of text and visuals.	The report is not created in a professional manner and does not balance text with visuals to effectively communicate content.
Attention to Details - *Did you follow the APA (7th ed.) formatting guidelines?*	The report includes required citations. The APA formatting guidelines are used in text and references. The report demonstrates the authors' ability to pay attention to detail.	The report includes required citations of ideas. There are minor issues noted in APA formatting guidelines in text and references.	The report includes required citations of most ideas. Some errors are noted in APA formatting guidelines in text and references.	The report does not include required citations of ideas. Serval errors are noted in APA formatting guidelines in text and references. Or, the report is not submitted.

Appendix 7: Client Feedback Sample

Gamechangers Feedback (10/20)

Report (5/10)

- The custodial survey data collected was precise and succinct. The qualitative methodology was organized and well summarized as was the data representation
- The literature reviews were clearly communicated, I would encourage using more "like" organizations ex: K-12 education vs. corporate and university custodial data in the reviews.
- The Gamechangers used relevant documentation and evidence to support findings. Further, they clearly understood the task at hand and provided viable tangible solutions to the challenges discovered
- The research was detailed and thorough
- The report was well written and addressed multiple learning styles (audiences) of that found in our organization

Presentation (5/10)

- The team did an excellent job in presenting the history, summary, findings and recommendations to the organization.
- The power pointe aligned to the presentation and was aesthetically pleasing
- The Gamechangers presented via zoom and allowed an opportunity for clarifying questions from the team. Additionally, they communicated "hard to hear" information in a professional manner while providing supporting details and solutions.
- I appreciate that the PPT can be immediately shared with the Custodial team's staff; this will make implementation of the plan a much smoother process.

Final Summary

The Gamechangers did a phenomenal job in researching, gathering and analyzing data, and presenting their findings with viable solutions. They were open to feedback such as things to consider call "threats" challenges – personalizing the "human resources" to address instructional/educational academic language, "overreach" to "alignment", and "positives/negatives" to pros and cons. I was quite impressed with the delivered product and encouraged the team to consider consulting in the future. I especially appreciated their ability to think through the issues from the lens of all stakeholders/parties, encouraging the implementation of proposed solutions. The Gamechangers were able to identify, address, implement and effectively communicate the issues/challenges and possible solutions. They suggested timely check in's to the team and monitoring progress or lack thereof accordingly. An example of that was when they recommended incentivizing and or employee appreciation/recognition to the team by using an authentic rubric. The team seems to possess true change agent qualities and provided a well-organized report. They truly approached this project with a "district lens" and engaged all stakeholders. I look forward to being in this work with our Custodial Team Directors and helping them improve their practice.

Appendix 8: Peer Evaluation Form

Evaluate each member (including you) by circling the number that best reflects the extent to which he/she participated, prepared, helped the group excel and was a team player. Use the following ratings:

4 Usually (over 90% of the time)   2 Sometimes (less than half the time)
3 Frequently (more often than not)   1 Rarely (never or once in a great while)

Preparation
Prepared for team meetings; has read course material and understands the issues and subject matter; completes team assignments on time; attends and is on time to team meetings

Participation & Communication
Articulates ideas effectively when speaking or writing; submits papers without grammatical errors; listens to others; encourages others to talk; persuasive when appropriate

Helps Group Excel
Expresses great interest in group success by evaluating ideas and suggestions; initiates problem solving; influences and encourages others to set high standards; doesn't accept just any idea but looks for the best ideas; stays motivated from beginning to end of projects

Team Player (Cooperation)
Knows when to be a leader and a follower; keeps an open mind; compromises when appropriate; can take criticism; respects others

Member Name	Team Player	Helps Group Excel	Participation & Communication	Preparation
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
(yourself)	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely

(Source: Adapted from Baker (2008), p. 205)

Please use this space for any additional comments.

_____

Honor Pledge: To the best of my recollection and ability, the above ratings accurately reflect the performance of my peers as well as mine.

Signature: _____   Date: _____