

HRD 5308 Needs Assessment (21817)

Spring 2022

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

Instructor: Dr. Yonjoo Cho (ycho@uttyler.edu), Associate Professor
Class Time: January 10 – April 30 (Spring Break: Week of Mar 7)
Office Hours: Tue. & Thu. at 7:00 pm – 8:30 pm CST (Other times by appointment via email)
Communication: Canvas, emails, and Zoom
Course Access: <https://uttyler.instructure.com/courses/29065>
Zoom: <https://uttyler.zoom.us/my/yjcho>

COURSE DESCRIPTION

This course centers on concepts, cases, and practices of needs assessment in organizations. 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

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 and surveys) and analysis methods (e.g., content analysis) and a needs assessment method: 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.

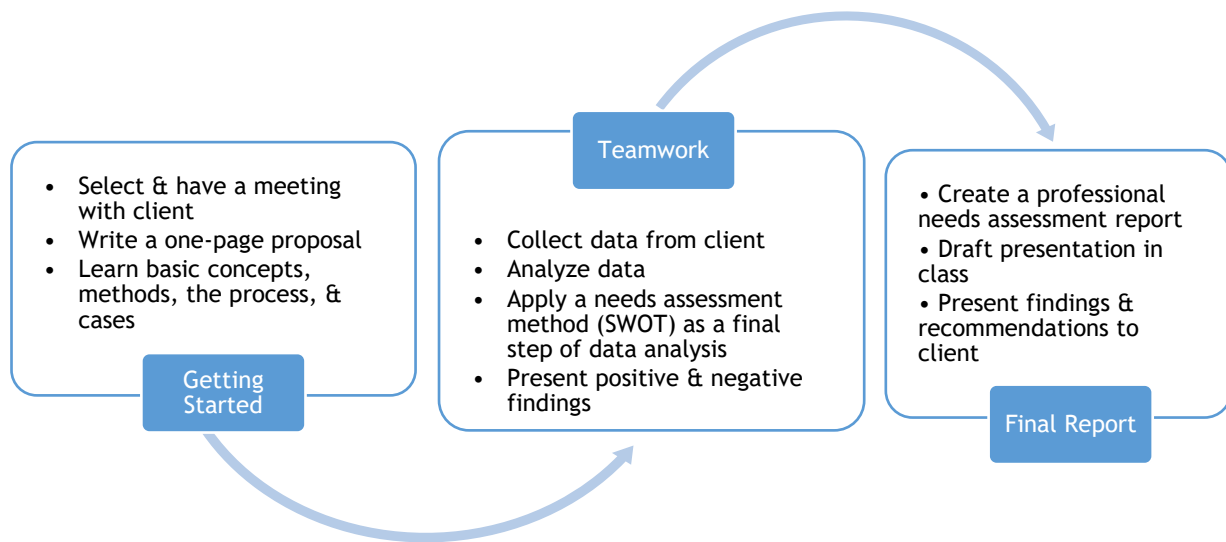
- Develop communication skills through working with team members, the instructor, and clients.
- Reflect on lessons learned from individual, teamwork, and class participation activities.

COURSE OUTLINE

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

Figure 1

The Needs Assessment Process



This course is composed of five units: introduction, basics, data collection, and data analysis (SWOT Analysis as a final step), and draft and final presentation and reflection.

Unit 1: Introduction

Understand the structure of this course, including teamwork, instructor's expectations, assignments, grading policies, and ethical considerations.

Unit 2: Basics

Develop a common understanding of basic concepts, underlying principles, and cases of needs assessment.

Units 3-4: Data Collection and Analysis

Learn and practice data collection and analysis methods required for needs assessment including:

- Data collection (e.g., interviews and surveys) and analysis methods (e.g., content analysis)
- SWOT Analysis as a needs assessment method

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 the instructor and classmates.
- 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 with reading the Read Me First (Canvas Modules) that will be posted by Friday at 9:00 am CST. In Read Me First pages, I will guide you to the content and things to do in the following week.

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

In the first week, post your introduction in Discussion (Canvas) to get to know other students and identify your team members to work on a needs assessment project throughout the semester.

SYNCHRONOUS MEETINGS

Research on online teaching and learning (e.g., Garrison et al., 2000¹) indicates that students need synchronous meetings to feel “presence” in online classes. To that end, we will have a few synchronous meetings via Zoom (<https://uttyler.zoom.us/my/yjcho>) to clarify assignments including:

- Orientation in the first week
- Team Clinics
- Draft report presentation in Week 14

You are required to attend an orientation, scheduled team clinics, and draft presentation meetings. I will also provide Zoom recordings so that you can visit missing meetings whenever convenient.

If you cannot make the draft presentation meeting as a team, please let me know in advance so that I can arrange an alternative presentation format such as a video presentation.

I will determine the most convenient times for Zoom meetings through Doodle surveys. I will also open weekly office hours via Zoom on Tuesdays and Thursdays between 7:00 pm and 8:30 pm CST to meet many working students’ needs and answer any questions. **The first 30 minutes will be reserved for general questions about assignments.** As for team-based and individual meetings, I expect you to contact me to avoid a schedule conflict.

TEAMWORK

¹ 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](https://doi.org/10.1016/S1096-7516(00)00016-6)

This course is based on **team project-based learning** as many business courses are, so students are required to work in teams as well as individually. To that end, follow the steps:

- Form a team of three students based on common interests (e.g., HRD), proximity (e.g., the same time zone), and diversity (e.g., gender, nationality).
- 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 are converted from your average teamwork score (out of 4), I will provide you with development advice.

CLIENT INVOLVEMENT

In this course, client involvement is a must in the needs assessment project process for students to apply what they learn to a real organization so that they can provide findings and recommendations. Your client will be asked to evaluate the quality of teamwork, the final report, and your final presentation at the end. 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

Research shows that team-based project learning is not possible without the instructor's feedback, so this course is based on my constant, detailed feedback provided throughout the semester. In the process, you will learn how to meet assignment requirements and improve writing as a master's students 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 limited time, I am going to give you one more opportunity to improve your assignment after receiving my first grade, if you want.

To make this developmental process of assignments possible, the seamless communication between you (your team leader, specifically) and me is highly encouraged. To that end, do the following:

- Take advantage of my regular office hours via Zoom. If you want to block out a time slot for a meeting, please let me know in advance.
- I don't mind meeting at night, if that is preferable.
- If your message is urgent, send me an email via ycho@uttyler.edu.
- If you need technical support, please contact the Help on Canvas.

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 a project-based learning course 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., free-ride). The bottom line for you is to learn as intended so that you will become an informed HR(D) practitioner in diverse contexts. To achieve this goal, please be willing to learn new competencies such as the SWOT Analysis and APA writing style. A critical success factor is communication, communication, and communication!

ASSIGNMENTS AND DUE DATES

Students are required to complete four assignments: weekly discussion postings, a needs assessment project, class participation activities, and a reflection paper. Most assignments are due by **Sundays at 11:59 pm EST**:

	Topic (Points)	Level	Points (%)	Due
1	Weekly discussion postings (8 weeks x 10 pts)	Individual	80 (22)	Weeks 1 to 10 (Answers by Wed and Comments by Sun)
2	Needs Assessment Project 1. Team ground rules (10) 2. Client selection (10) 3. One-page proposal (20) 4. Permission letter (10) 5. Progress report (20) 6. SWOT Analysis (draft) (20) 7. Draft presentation (40) • Draft report (30) • Presentation (10) 8. Solicit client feedback on findings & recommendations 9. Final submission (30) • Final report (20) • Transmission letter (10) 10. Final presentation to client 11. Client evaluation* (20)	Team	180 (50)	1/23 1/30 2/6 2/13 3/20 3/27 4/10 (TBA) Week of 4/11 4/17 Week of 4/18 4/24
3	Class Participation 1. Introduce yourself (10) 2. Discussion lead (20) 3. Team contributions: mid-term & final peer-evaluation (20x2) 4. Class evaluation (mid-term) (10)	Individual	80 (22)	1/12 (Wed) Week of your choice 3/6 & 4/24 3/6
4	Reflection Paper	Individual	20 (6)	4/24
Total:				360

(Note: I will solicit client evaluation on your final report, presentation, and teamwork.)

Weekly Discussion Postings (80 pts)

I will post weekly discussion questions 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** to a week's discussion question by the end of **Wednesday** and two comments on other students' answers by the end of **Sunday**. This assignment is worth 10 points each week: 6 points for an answer and 4 points for two comments.

Choose a week to play a discussion lead role and write down your choice on [Google Docs](#). **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. To that end, do the following:

- Read all required and optional readings.
- Read all your discussion group members' postings.
- Respond to interesting postings and ask probing questions for in-depth discussion.
- To earn the full 10 points, you must be present throughout the week.

In the process of weekly discussions, students will better understand needs assessment in the real world and develop critical thinking skills accordingly. I will provide immediate 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 (Sun). I suggest you post the two comments before it is too late so that you may have discussion with others (see **Appendix 1 for the postings rubric**).

Needs Assessment Project (180 pts)

Work in teams. This final project is an outstanding opportunity to apply the concepts, principles, and a SWOT Analysis as a needs assessment method 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 you know and 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 urgent 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 expectations for both parties. In other words, do not 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 are expected to include all key elements and plan the 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 improve the proposal, if that is what**

you want. 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. If you are limited in data collection due to the pandemic, consult with me in advance.
- Use a **SWOT Analysis** as the final step of data analysis and deliver findings and recommendations.
- Write a ten-page, **single-spaced draft report**, except appendices and references. The key components of the final report include:
 1. The cover page includes a project title, the course title, submission date, and team member names.
 2. (1-page) Executive Summary outlines the report.
 3. Acknowledgements includes all key stakeholders' full names to express appreciation 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 analysis 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 highly regarded for online masters' students as they can do a rehearsal before a final presentation to the client and to see how other teams have completed a report. 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, submit the final report to me and the client (due: April 17), and present findings and recommendations to the client as scheduled in the week of April 18. The **final report** should be written in a compact, pointed, and professional manner so that clients can easily understand (see **Appendix 6 for the final report rubric**).

The draft and final 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 formatting guidelines). Final report samples are available on Canvas Files. At the end of the semester, I will ask for **client feedback** (20 pts.) on the quality of the 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 324	323-288	287-252	251-216	Below 216

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 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.

IMPORTANT COVID-19 INFORMATION

Students are required to wear face masks covering their nose and mouth and follow social distancing guidelines at all times in public settings (including classrooms and laboratories). The UT Tyler community of Patriots views adoption of these practices consistent with its Honor Code and a sign of good citizenship and respectful care of fellow classmates, faculty, and staff.

Students who are feeling ill or experiencing symptoms such as sneezing, coughing, or a higher than normal temperature will be excused from class and should stay at home and may join the class remotely. Students who have difficulty adhering to the Covid-19 safety policies for health reasons are also encouraged to join the class remotely. Students needing additional accommodations may contact the Office of Student Accessibility and Resources at University Center 3150, or call (903) 566-7079 or email saroffice@uttyler.edu.

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

You are required to follow the APA style² in all writing assignments as it is required in the UT Tyler HRD MS degree program. Take a closer look at the APA (ppt file) on Canvas Files and see how I referenced publications in this syllabus as well. Find more information on APA at: https://owl.purdue.edu/owl/research_and_citation/apa_style/apa_style_introduction.html.

HRD Masterclass Podcast Series (hrdmasterclass.com)

The Academy of Human Resource Development (AHRD), which is the premier organization in HRD, has recently created two 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. For instance, Season 1 Episode 7 (Diversity, Equity, and Inclusion) and Season 2 Episode 4 (Employee Engagement) are sponsored by UT Tyler’s Department of HRD. See the following (*Note: The empty cells will soon be filled*):

Season 1 Episode	Topic	HRD Scholar	Season 2 Episode	HRD Scholar
1	History and Foundation of HRD	Perriton & Swanson	Action Learning	Brook & Marquardt
2	Learning in Organizations	Alston, Marsick & Watkins	Ethics in HRD	Durani, Hughes & Kuchinke
3	Organization Development	Egan & McLean	Technology in HRD	Akdere, Bennett & Khandelwal
4	Training & Development	Jacobs, Shirmohammadi & Yoon	Employee Engagement	Lee, Nimon & Shuck
5	Career Development	Ghosh & McDonald	Marginalization & Privilege	Collins, Gedro & Scott
6	Critical HRD	Bierema, Elliott & Greer	Training Transfer & Sustainment	Nafukho & Ruona
7	Diversity, Equity, & Inclusion	Byrd, Cho & Sparkman		
8	Cross-Cultural Issues	Osman-Gani & Rasdi		
9	Evaluating HRD	Ke & Ruff-Eft		
10	Strategic HRD	Garavan & Hutchins		
11	Fundamentals of HRD	Short		

² American Psychological Association. (2020). *Publication manual of the American Psychological Association: The official guide to APA style* (7th ed.). American Psychological Association.

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-Eft, 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.

REQUIRED READINGS

Week 1 (1/10 - 1/16) – 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 (1/17 - 1/23) – Basics 1

- 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 3 (1/24 – 1/30) – 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 (1/31 – 2/6) – 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> [Case 1]

Week 5 (2/7 – 2/13) – 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> [Case 2]
- 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 6 (2/14 – 2/20) – Interviews

Doane, E., & Cumberland, D. M. (2018). Community policing: Using needs assessment to gain understanding before implanting. *Performance Improvement Quarterly*, 31(2), 165-187. <https://doi.org/10.1002/piq.21264> [Case 3]

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 7 (2/21 – 2/27) – Cho’s participation in the 2022 AHRD Conference in Arlington, VA (no class)

Week 8 (2/28 – 3/6) – 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., & Kaufman, R. (2009). Developing performance data for making useful faculty and leadership decisions: Needs assessment as a vehicle. *Performance Improvement Quarterly*, 22(3), 71-82. <https://doi.org/10.1002/piq.20061> [Case 4]

Week 8: 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.

Week 9 (3/7 – 3/13) – Spring Break (no class)

Week 10 (3/14 – 3/20) – A Needs Assessment Method: SWOT Analysis

Cho, Y., Zhu, M., Techawitthayachinda, R., & Qian, L. (2020). A needs assessment of online core courses for student learning in higher education. In D. F. Russ-Eft & C. M. Sleezer (Eds.), *Case studies in needs assessment* (pp. 48-60). SAGE. [Case 5]

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 10: 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)³

Unit	Week	Topic	Reading	Assignment/Activity
U1 (Intro.)	1 (1/10-1/16)	Introduction Orientation (Zoom meeting 1)	Parker (2006)	Introduce yourself (due: 1/12) Discussion 1 (Wed & Sun)
U2 (Basics)	2 (1/17-1/23)	Basics 1	Rossett (2009); Sleezer et al. (2014a, 2014b)	Discussion 2 Team formation & ground rules (1/23)
	3 (1/24-1/30)	Basics 2	Altschuld (2004); Russ-Eft & Sleezer (2020)	Discussion 3 Client selection (1/30)
	4 (1/31-2/6)	Ethical Issues Case study 1	Sleezer et al. (2014); Stefaniak et al. (2015)	Discussion 4 One-page proposal (2/6)
U3 (Data Collection)	5 (2/7-2/13)	Data Collection & Analysis Case study 2	Aull et al. (2016); Sleezer et al. (2014)	Discussion 5 Permission letter (2/13)
	6 (2/14-2/20)	Interviews Case study 3	Doane & Cumberland (2018); Russ-Eft & Preskill (2009)	Discussion 6
	7 (2/21-2/27)	Cho's Participation in the 2022 AHRD Conference in Arlington, VA (no class)		
	8 (2/28-3/6)	Surveys Case study 4	Russ-Eft & Preskill (2009); Swart & Kaufman (2009)	Discussion 8 Mid-term evaluation (peer and class) (3/6)
U4 (Data Analysis)	9 (3/7 - 3/13)	Spring Break (no class)		
	10 (3/14-3/20)	NA Method: SWOT Analysis Case study 5	Cho et al. (2020); Leigh (2010)	Discussion 10 Progress report (3/20)
	11 (3/21-3/27)	Critical Success Factors Draft Presentation: Guidelines		SWOT Analysis (draft) (3/27)
	12 (3/28-4/3)	Team Clinic (Zoom meeting 2)		
U5	13 (4/4-4/10)	Project Work		Draft report & presentation file (4/10)
	14 (4/11-4/17)	Draft Presentation (Zoom meeting 3)		(*Ask for client feedback on findings and recommendations before finalizing your report)

³ I will keep you informed about the changed syllabus with the date updated, as in the syllabus-1-10.

(Synthesis)			Final report & transmission letter (4/17)
	15 (4/18–4/24)	Final Submission to me and client Final Presentation to client	Client evaluation (4/24) Final peer evaluation (4/24) Reflection paper (4/24)
	16 (4/25–4/30)	Reflection	Course evaluation

Appendix 1: Weekly Discussion Postings

Rubric

Evaluation Criteria	Rating		
	Excellent	Needs Work	Unsatisfactory
Meeting two deadlines (Wed & Sun)	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 (7 th 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

Triple LC Ground Rules

Members: Lauren DeHaan, Linda Galocy, Luca Giupponi, Christian Smeltzer

Team Lead: Linda Galocy

Purpose

To successfully conduct a needs assessment, enjoy our team experience, focus on the weekly tasks, provide guidance and expertise to each other, and actively contribute.

Documents

Our team will utilize Google Docs for creation, storage, and collaboration. An IU Box folder will house final documents. Each team member is a co-owner of this folder.

Communication

Our team will meet every Friday at 1:00 Est. via Zoom. If a team member is going to miss a meeting, they will notify the group as soon as possible so that the meeting can be recorded. Slack will be utilized for more frequent communication among the team with an expected response time to occur within 24 hours for general communication. For more frequent communication and in order to meet class deadlines team members are expected to respond within 6 hours.

An agenda will be shared with the team by the team leader. The outcomes of each meeting will be to identify deliverables and responsible person as well as the next week's meeting date and time.

Participation

- Each member will actively participate
- If a meeting needs to be missed, communication to the team will occur as soon as possible
- Be flexible and respectful of time
- If a team member is having an overwhelming/stressful week it is expected that they will reach out for help to other team members

Consensus and Disagreements

- All decisions are to be made as a group
- Listen when there is disagreement, understand and respect each other's point of view, and work towards resolving the conflict with a decision that each team member is comfortable with.
- Keep in mind that the work of the whole contributes to the diversity of the team and improves the work product.

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

TEAM TYLER - Proposal Jeff Daniels, Alexis Puz, Mark Stark, Kayla Vaughn

Needs Assessment on the Security Program at NPC Inc.

Purpose: The purpose of this needs assessment is to assess the gap in the security program at NPC Inc. and provide solutions to areas needing improvement. Our team will collaborate with leadership (supervisors and managers) in NPC Inc. and make recommendations for security training measures.

Rationale: NPC Inc. is a large-scale printing company serving government vendors with confidential and proprietary information in electronic and paper format. As national security concerns and personnel security threats increase, NPC Inc. must meet the growing demands. A needs assessment will identify the security gaps for supervisors and managers at NPC Inc.

Key Stakeholders: Key stakeholders are the NPC Inc. supervisors and managers directly connected to the security clearance process and the end users of the security clearance process..

Frame Factors: Internal factors include - varying time zones, scheduling meetings around work schedules, and completing the needs assessment within a two and a half month period. External factors include - communicating with NPC Inc. and its staff members via telephone conversations and Zoom meetings due to limited face to face communication.

Data Collection and Analysis Methods:

- Literature review on current security verification, investigations, Public Trust requirements, and the security clearance process.
- Document review of previously used training material regarding company security program as well as any security clearance related policies in place.
- Interviews of 16 managers and supervisors directly associated with the security clearance process.
- Create a survey to include 15-20 end users of the security clearance process.
- Content analysis of the interview data.
- Descriptive statistical analysis of the survey data.
- SWOT analysis as the final data analysis step.

Project Schedule and Division of Labor

Task/Major Milestone	Date Due	Leader
Client Selection	1/12	Team Tyler
Initial Client Meeting	1/13	Alexis
Project Proposal	2/8	Mark
Permission Letter	2/22	Alexis
Data Collection:		
a. Literature review	2/23	Kayla
b. Document review	2/19	Kayla
c. Interview	2/26	Alexis
d. Survey questionnaire	3/5	Alexis/Jeff
Data Analysis:		
a. Content analysis of the interview data	3/12	Jeff
b. Descriptive statistical analysis of the survey data	3/15	Jeff
c. SWOT analysis	3/22	Mark
Submit Progress Report	3/15	Kayla
Submit Draft Report and Presentation	4/12 & TBA	Alexis
Solicit Client Feedback on findings and recommendations	Week of 4/12	
Submit Final Report to Dr. Cho and Client	4/19	Mark
Final Presentation to Client	Week of 4/19	Team Tyler

Appendix 5: Permission Letter Sample



P: 800.847.5757
F: 814.239.8706

www.npcweb.com

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 - <i>Did you include all key elements of the final report?</i>	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 - <i>Is the report well-organized? Does it have a logical flow?</i>	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 - <i>Is the report written in ways that clients can easily understand?</i>	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 are 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 - <i>Is there a right match between project goals and methods used?</i>	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 - <i>Is the report created in a professional manner?</i>	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 - <i>Did you follow the APA (7th ed.) formatting guidelines?</i>	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. Several errors are noted in APA formatting guidelines in text and references. Or, the report is not submitted.

Appendix 7: Client Feedback Sample

Final Report – Total 10/10

Report 5/5

- The report for this project met and exceeded expectations.
- It was clear and demonstrated a complete understanding of the project and issues.
- The report used relevant documentation along with current program used with survey and Interview of staff.
- The project, survey and interviews were handled in a very professional manner and the methodology used was very appropriate.
- The evidence and recommendations are spot on and presented in a manner they can be accomplished.
- The report is very professional and organized in the right manner.

Presentation 5/5

- The presentation occurred in a face to face meeting with both a hard bound very professional presentation and slide show presentation.
- The face-to-face presentation attended by all three members demonstrated a very clear understanding of this project and exceeded what we wanted to glean from the project.
- The written and slide show presentations were organized and professional and demonstrated that the time put into this project and effort by the team to not only accomplish the project but do so in a manner that showed great effort from the team.

Overall Summary

- The report and face-to-face presentation along with the slide show were well thought out and developed in both form and function.
- The findings were what I would have anticipated and backed up issues with current process.
- The team did enlighten us in a couple of areas that we had not anticipated and put in the report a concise plan for us to implement.
- The report backed areas of concern that we had and has given us the validation to make changes in the current training process.
- The SWOT data and analysis provided strong validation for moving forward with recommendations presented by the team.
- All three team members appeared to work well together and show a genuine concern for providing findings that would benefit key stakeholders and employees.

Final Thought

I truly appreciate the professionalism and effort put into this project. The recommendations put forth by these students demonstrated a clear understanding of what we hoped to achieve, and it was clear that the teaching and collaboration from the institution along with the template and guidance were learned and applied in this project. We are excited that the findings have caused us to put into action recommendations made by the team.

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
(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: _____