

## HRD 5308 Needs Assessment in HRD (20556)

Spring 2024

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](mailto:ycho@uttyler.edu)), Professor  
Class Time: 1/16 – 4/28 (Spring Break: Week of 3/11)  
Orientation: Week 1 (1/16) at 7:00pm CT via Zoom  
Weekly Meetings: Tuesdays at 7:00pm CT, except on 2/20 (AHRD Conference) & 3/12 (Spring Break)  
Draft Report Presentation: Week 14 (4/16) at 7:00pm CT  
Communication: Canvas, emails, Zoom, and Telephone (903-566-7260)  
Course Access: <https://uttyler.instructure.com/courses/39116>  
Zoom: <https://uttyler.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 diverse organizations
- To learn how to use data collection and analysis methods and SWOT Analysis as a tool for needs assessment
- To carry out a needs assessment project by working with a real organization that student teams choose
- To learn the balancing act of individual and teamwork activities to fully grasp the gist of needs assessment in HRD

### CORE COMPETENCIES

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 use a needs assessment tool (e.g., SWOT Analysis).

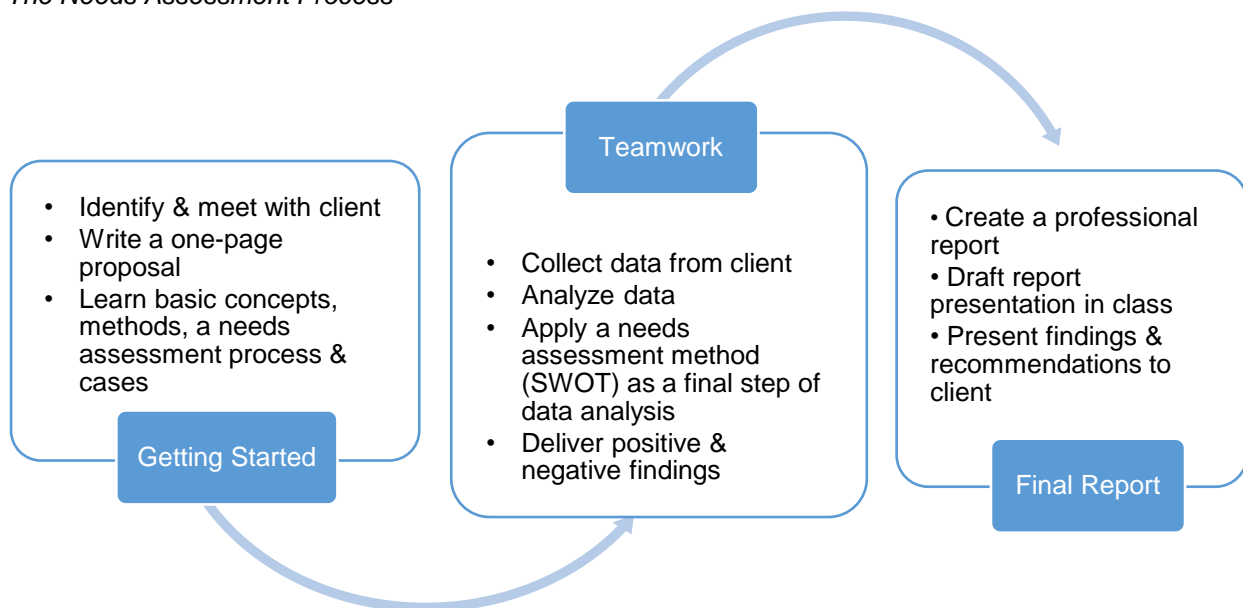
- Perform a needs assessment of a client organization:
  - Select a project topic and client
  - Write a one-page proposal
  - Collect and analyze data and use a SWOT Analysis as a final step of data analysis
  - Create a final report and present findings and recommendations to client.
- Develop communication skills from working with team members, the instructor, and clients, 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:

**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, the 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 findings and recommendations in class (draft presentation) and to 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, along with the final report.

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 **Sat at 9:00am CT** 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<sup>1</sup>) indicates that students need synchronous meetings to feel **presence** in online classes. To that end, we will have weekly meetings via Zoom (<https://uttyler.zoom.us/my/yjcho>) to be on the same page concerning assignments:

- Orientation in Week 1 (1/16)
- Weekly meetings throughout the week
- Team clinic in Week 12
- Draft report presentation before final presentation to client in Week 14 (4/16)

These synchronous meetings are optional, though highly recommended. After a meeting, I will provide a recorded Zoom session for those who could not make it. 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 ask you to take a **Doodle Poll** a week before the semester begins. I will choose the time based on the majority rule as the meeting time in the semester.

### INDIVIDUAL AND TEAM WORK

This course is composed of individual work (42%) and team project-based learning (58%) 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. 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!**

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<sup>1</sup> 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)

- **Form a team of three or four 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, I will ask you to fill out a peer evaluation form (attached at the end of this syllabus) twice, at the mid-term and the 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) which 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 skills.

## CLIENT INVOLVEMENT

In this course, client involvement is essential as they will be instrumental for students to apply what they learn in class to a real organization so that they can provide evidence-based findings and recommendations. Here are four recommended client selection criteria:

- **Fit:** Do your client's needs fit the objective of your need assessment project?
- **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 all the time?

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. When done, I will ask your client to evaluate the quality of your project work: qualitative details and quantitative evaluation (20 points) by the end of the week of your final presentation.

## 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, 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 an original grade within three days, 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 for high quality standards required 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 and detailed feedback. If assignment guidelines are unclear to you, ask for clarification. If you do not understand my evaluation comments, which happens 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** and needs analyst or needs assessor in diverse contexts. To achieve this goal, please be willing to learn required competencies as master's students including writing a one-page proposal, the SWOT Analysis, and APA writing style as well as becoming a professional. 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. 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 weeks)		Ind	80 (19)	Weeks 1, 2, 3, 4, 5, 7, 8, & 10 (1 Answer by Wed & 2 Comments by Sat)
Needs Assessment Project	1. Team formation	Team	250 (58)	1/21
	2. Team ground rules (10)			1/28
	3. Client Selection and Initial Meeting (10)			2/4
	4. One-page proposal (30)			2/11
	5. Permission letter (10)			2/18
	6. Progress report (30)			3/24
	7. SWOT Analysis (30)			3/31
	8. Team Clinic			Week of 4/1
	9. Draft Report (50) & Presentation (20)			4/14
	10. Draft Report Presentation			4/16
	11. Client feedback on findings and recommendations			Week of 4/15
	12. Final Report (30) & transmission letter (10)			4/21
	13. Final presentation to client			Week of 4/22
	14. Client evaluation (20) ( <b>Note:</b> I will solicit this for you!)			4/26 (Fri)
Class Participation Activities	Introduce Yourself (10)	Ind	80 (19)	1/17 (Wed)
	Discussion lead (20)			(Your choice)
	Team contributions: Mid-term & final peer-evaluation (20x2)			3/10 & 4/28
	Class evaluation (mid-term) (10)			3/10
Reflection Paper		Ind	20 (4)	4/28
Total			430 (100)	

### WEEKLY DISCUSSION POSTINGS (80 pts)

You will develop an understanding of concepts, principles, and cases of needs assessment in the first 10 weeks of the semester through reading two required readings, except in Week 3. 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 **Sat**. **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 "a compact and pointed answer within a short paragraph":

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

**Sample answer:** Rossett (2009) emphasizes through several cases that needs assessment is an ongoing process, while Sleezer et al. (2014) define a needs assessment as determining how to fix a current or future problem. When considering both sources, I define needs assessment as a systematic process of identifying an organization's current and desired conditions. Once the needs are identified, a plan can be created to bridge the gaps. Needs assessment is an ongoing process because changes can be made to improve outcomes further before, during, and after training (quoted from Cheryl Moore, 2023).

I am going to form two discussion groups due to the large number of students enrolled. From the second week on, a discussion leader in each discussion group will lead the week's discussion. To that end, choose a week to lead discussion 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 strengthen your knowledge on the week's topic and how to ask probing questions to engage students in in-depth discussion. This assignment has been highly appreciated 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 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 concepts and principles of needs assessment and develop critical thinking skills. 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 answer by **the second due date (Sat)**. I suggest you post your answer and two comments early so that you can be active in discussion. 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 (250 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:

- Form a team of three or four 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. A team member's employer may be a good choice.
- In an initial meeting with your client, find out 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. In other words, don't be too ambitious about the project outcomes.
- Based on the information gathered from the initial meeting, write a **one-page proposal**, including the following:
  - Clearly state the project title and 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 serves 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 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 for credibility.
- Use a **SWOT Analysis** as the final step of data analysis and deliver findings and recommendations.
- Once you go through all required steps, write a single-spaced, ten-page **draft report**, except appendices and references. The key components of the report include:
  1. The cover page includes a project title, the course title, submission date, and team member names.
  2. A one-page Executive Summary outlines the report.
  3. Acknowledgements include all key stakeholders' full names to express appreciation for their assistance.
  4. Table of Contents includes the main body, appendices, and references, along 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. Provide a figure of SWOTs, listing bullets in four cells.
  8. Findings include strengths and areas for improvement. **Number findings consecutively**, as in Finding 1, Finding 2. . . and Finding 10, which will be referred back 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 their 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 see how other teams are doing as well. After draft presentations are over, teams are required to ask their client to provide 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 21) along with a transmission letter, and present findings and recommendations to the client as scheduled in the week of April 22. 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) all required elements, (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). **Eighteen 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) your introduction, (b) discussion lead, (c) teamwork evaluation at the mid-term and final (see **Appendix 8** for the peer evaluation form), and (d) the mid-term class evaluation.

### **REFLECTION PAPER (20 pts)**

Write a (single-spaced, one-page) reflection paper. This end-of-class reflection should include lessons learned from class activities and team project learning. To that end, include: (a) a title, purpose, and introduction, (b) key points of lessons learned, and (c) suggestions/conclusions. To that end, title the reflection paper to aptly sum up your learning experience in a nutshell.

### **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 reason 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. To accomplish these goals, both students and faculty of the Soules College of Business at The University of Texas at 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.

Furthermore, the Soules College of Business strongly adheres to the UT Tyler [Honor Code](#): “Honor and integrity that will not allow me to lie, cheat, or steal, nor to accept the actions of those who do.”

## 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* (7<sup>th</sup> 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.

**HRD Journals:** Five representative HRD journals include:

- *Advances in Human Resource Development* ([ADHR](#))
- *European Journal of Training and Development* ([EJTD](#)),
- *Human Resource Development International* ([HRDI](#))
- *Human Resource Development Quarterly* ([HRDQ](#)), and
- *Human Resource Development Review* ([HRDR](#)).

If you become a student member in the Academy of Human Resource Development ([AHRD](#)), you can easily access all four AHRD-sponsored journals ([ADHR](#), [HRDI](#), [HRDQ](#), and [HRDR](#)).

### HRD Masterclass Podcast Series ([hrdmasterclass.com](http://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.

## Business Librarian

Business Librarian at UT Tyler's Muntz Library Sarah Norrell (snorrell@uttyler.edu) is a great resource to help you to search HRD publications and to conduct a literature review on an HRD topic.

## 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* (2<sup>nd</sup> 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* (3<sup>rd</sup> ed.). Wiley.

## FIVE NEEDS ASSESSMENT CASES

- 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]
- Aull, J., Bartley, J., Olson, C., Weisberg, L., & Winiacki, 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]
- 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 3]
- 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 4]
- 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> [Case 5]

## REQUIRED READINGS

All weekly readings are posted in Canvas Files ("weekly readings").

### Week 1 (1/16 - 1/21) – Introduction

- Parker, G. M. (2006). What makes a team effective or ineffective? In J. V. Gallos (Ed.), *Organization development* (pp. 656-680). Jossey-Bass.
- Rossett, A. (2009). Tales from the trenches. In *First things fast: A handbook for performance analysis* (2<sup>nd</sup> ed.) (pp. 203-239). Pfeiffer.

### Week 1 – Optional

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

**Week 2 (1/22 - 1/28) – Basics 1 (Note:** Two book chapters of Sleezer et al. (2014) are integrated into one reading.)

- 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.

- Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014a). Overview of needs assessment. In *A practical guide to needs assessment* (3<sup>rd</sup> 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* (3<sup>rd</sup> ed.) (pp. 35-49). Wiley.

### **Week 3 (1/29 – 2/4) – Basics 2**

- Altschuld, J. W. (2004). Emerging dimensions of needs assessment. *Performance Improvement*, 43(1), 10-15. <https://doi.org/10.1002/pfi.4140430104>

### **Week 4 (2/5 – 2/11) – Ethical Issues & Case 1**

- Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014). Dealing with ethical issues. In *A practical guide to needs assessment* (3<sup>rd</sup> 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 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 (2/12 – 2/18) – Data Collection and Analysis & Case 2**

- Aull, J., Bartley, J., Olson, C., Weisberg, L., & Winiacki, 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* (3<sup>rd</sup> 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 (2/19 – 2/25) – 2024 AHRD Conference in Arlington, VA (no class)**

### **Week 7 (2/26 – 3/3) – Interviews & 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 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* (2<sup>nd</sup> ed.) (pp. 313-343). Basic Books.

### **Week 7 – Optional**

- Gilmore, E. R. (2006). Using content analysis in human performance technology. In J. A. Pershing (Ed.), *Handbook of human performance technology* (3<sup>rd</sup> ed.) (pp. 819-836). Pfeiffer.
- 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 8 (3/4 – 3/10) – Surveys & Case 4

Russ-Eft, D. & Preskill, H. (2009). Survey and questionnaires. In *Evaluation in organizations: A systematic approach to enhancing learning, performance, and change* (2<sup>nd</sup> 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> [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* (3<sup>rd</sup> ed.). John Wiley & Sons, Inc.

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

### Week 9 (3/11 – 3/17) – Spring Break (no class)

### Week 10 (3/18 – 3/24) – A Needs Assessment Tool: SWOT Analysis & 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> [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>

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.

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

Unit	Week	Topic	Reading	Assignment
U1 (Intro)	1 (1/16-1/21)	Introduction Orientation (1/16)	Parker (2006); Rossett (2009)	Introduce yourself (due: 1/17) Discussion 1 (Wed & Sat) Team formation (1/21)
U2 (Basics)	2 (1/22-1/28)	Basics 1: NA Definitions	Russ-Eft & Sleezer (2020); Sleezer et al. (2014a, 2014b)	Discussion 2 Team ground rules (1/28)
	3 (1/29–2/4)	Basics 2: NA Dimensions	Altschuld (2004)	Discussion 3 Client selection (2/14)
	4 (2/5–2/11)	Ethical Issues Case 1	Sleezer et al. (2014); Stefaniak et al. (2015)	Discussion 4 One-page proposal (2/11)

U3 (Data Collection)	5 (2/12–2/18)	Data Collection & Analysis Case 2	Aull et al. (2016); Sleezer et al. (2014)	Discussion 5 Permission letter (2/18)
	6 (2/19-2/25)	2024 AHRD Conference in Arlington, VA (no class)		
	7 (2/26–3/3)	Interviews Case 3	Mills & Stefaniak (2020); Russ-Eft & Preskill (2009)	Discussion 7
	8 (3/4-3/10)	Surveys Case 4	Russ-Eft & Preskill (2009); Swart (2021)	Discussion 8 Mid-term evaluation (peer & class) (3/10)
	9 (3/11–3/17)	Spring Break (no class)		
U4 (Data Analysis)	10 (3/18-3/24)	NA Tool: SWOT Analysis Case 5	Cho & Brown (2013); Leigh (2010)	Discussion 10 Progress report (3/24)
	11 (3/25–3/31)	Findings & Critical Success Factors Draft Presentation: Guidelines		SWOT Analysis (draft) (3/31)
	12 (4/1-4/7)	Team Clinic		
	13 (4/8–4/14)	Project Work		Draft report & presentation file (4/14)
U5 (Synthesis)	14 (4/15-4/21)	Draft Report Presentation (4/16) Final Report Submission to me and client		<ul style="list-style-type: none"> <li>• Ask for client feedback on findings and recommendations</li> <li>• Final report &amp; transmission letter (4/21)</li> </ul>
	15 (4/22–4/28)	Final Presentation to client & Reflection		Client evaluation (4/26, Fri) Final peer evaluation (4/28) Reflection paper (4/28) Course evaluation (online)

## Appendix 1: Weekly Discussion Postings

### Rubric

Evaluation Criteria	Rating		
	Excellent	Needs Work	Unsatisfactory
Meeting two deadlines (Wed & Sat)	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 two required readings in the week's answer	Required readings were cited in the week's answer	Only one of the two required readings was cited or none were cited in the week's answer	Neither of the two required 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 <sup>th</sup> 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

HRD 5308 – Needs Assessment

The Changers 2.0 (Jennifer, Derekia, & Vanessa)

### Team Ground Rules HRD 5308 Spring 2023

**Team Name:** The Changers 2.0

**Members:** Derekia Sherman, Jennifer Smart, and Vanessa Mercado

**Team Lead:** Jennifer Smart

**Purpose:** The purpose of this team project is to work collaboratively to conduct a needs assessment for an organization to identify a performance gap. Once a gap is identified we will work with the client to propose a solution that could improve areas that were identified.

**Documents:** Microsoft Word documents will be utilized for the creation, storage, and collaboration of content related to the team project. To communicate daily, we will use a GroupMe chat (discussed more in depth below). Our team leader, Jennifer Smart, will oversee submitting all assignments on the team's behalf and will provide other members with suggested revision requests made by Dr. Cho within the due dates for assignments.

**Communication:** A GroupMe chat has been created for the purpose of asking quick questions and exchanging vital information with team members. Zoom meetings are scheduled to be held weekly on Tuesdays at 7:00PM when we do not have our bi-weekly meeting and immediately after the bi-weekly meeting scheduled. If a team member is unable to attend a scheduled meeting, they must notify the team 24 hours prior to the meeting. A new proposed time and date will be agreed upon so that the meeting may be rescheduled for that week. If any communication is needed with Dr. Cho, the team leader will be the one to send the message on the team's behalf and will cc: the other members so that everyone is able to be part of the correspondence.

**Participation:** Team members are expected to be active participants. Team members should be flexible and respectful of others' time. If a team member is having trouble with a particular portion of the assignment, they will be expected to ask the other team members for help. All team members should come together and assist each other. During team meetings, all will be prepared to discuss the assignments that are due and seek feedback from each other.

**Disagreement/Conflict Resolution:** If conflicts or disagreements arise, all team members will remain respectful. Team members should seek clarification from each other to avoid miscommunication. Team members will have the opportunity to voice concerns and fully explain their thought process. A decision should be made based on team consensus that is in the best interest of the team. If a consensus is unable to be reached the team will go with the majority rule. If necessary, the team will ask Dr. Cho for guidance; emailing Dr. Cho should only be used after all other methods have been exhausted.

### Appendix 3: One-Page Proposal

#### Rubric

Evaluation Criteria	Rating		
	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 specific the better), and schedules and division of labor (the more specific the better).	One or two of the key elements is/are missing.	Two or more of the key elements are missing.
Being Thorough	The proposal is thorough. It gives an excellent idea about the project and how the team will conduct it.	The 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.	The 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 written in a bit longer than one page, violating the assignment requirement.	The proposal is written in more than one page, violating the assignment 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.
Clarity	The proposal is pointed, clear, and free of typos and grammar mistake(s).	The proposal is mostly pointed and clear and includes only a few typos and grammar mistakes.	The proposal is not pointed and clear and includes several typos and grammar mistakes.



## Appendix 4: One-Page Proposal Sample

HRD 5308: Needs Assessment

The Changers 2.0 (Derekia, Jennifer, & Vanessa)

### Needs Assessment on the Revamp of the Kingdom Builder's KB Wednesday Service

**Purpose**

The purpose of this needs assessment project is to identify gaps in the attendance of current Kingdom Builder's (KB) Wednesday service that should be aligned with the needs of the community

**Rationale**

The interview with KB's pastor, Donny Villarreal, and his wife, Jessica, have observed that the attendance for KB Wednesday has declined in the past six months whereas other services have not shown a decrease in attendance. Therefore, they would like us to conduct a needs assessment to address ways to increase the attendance of the KB Wednesday service.

**Key Stakeholders**

Pastors Donny Villarreal and Jessica Villarreal, the six members of the KB leadership team, and 150 adult church members.

**Frame Factors**

Internal factors include a limited timeframe to complete this project and collaborating virtually. External factors include communicating with two major contact persons only and virtually, and challenging scheduling due to their responsibilities.

**Data Collection**

- Literature review on employee engagement in non-profit organizations including church.
- Document review of previous KB Wednesday church service agendas and attendance data.
- Interview with key contact Donny Villarreal and Jessica Villarreal.
- A focus group interviews with six members of the KB leadership team.
- Create a survey with 150 members of the church.
- Content analysis of the interview and focus group interview data.
- Descriptive statistical analysis of the survey data.
- SWOT analysis as the final step of data analysis.

**Project Milestones and the Division of Labor:**

Task/Milestone	Due Date	Leader
Initial Client Meeting	1/27/2023	All
Project Proposal	2/5/2023	Jennifer
Permission Letter	2/12/2023	Vanessa
Data Collection:		
a. Literature Review	2/19/2023	All
b. Document Review	2/19/2023	All
c. One-on-One Interview and Focus Groups Interview	3/1/2023	Vanessa
d. Survey	3/1/2023	Jennifer
Data Analysis:		
a. Content analysis of the interview data	3/10/2023	Daisy
b. Descriptive statistical analysis of the survey data	3/10/2023	Jennifer
c. SWOT Analysis (draft)	3/26/2023	Daisy
Progress Report	3/12/2023	Daisy
Draft Report and Presentation	4/9/2023	All
Client feedback on Findings and Recommendations	4/16/2023	Vanessa
Final Report and Transmission Letter to Client and Cho	4/16/2023	All
Final Presentation to the Client	4/21/2023	Vanessa

**Appendix 5: Permission Letter Sample**

**tok** TOKYO OHKA KOGYO AMERICA, INC.

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February 12, 2023

Team TORX  
University of Texas at Tyler  
3900 University Blvd  
Tyler, TX 75799

Dear Team TORX,

I am writing to request a needs assessment for Tokyo Ohka Kogyo America, Inc. (TOK America), which specializes in high purity chemical manufacturing for semiconductor processes. Currently, we are facing challenges in hiring new talent in this challenging labor market. In order to streamline the onboarding process for our new employees, we recently upgraded to a new HRIS solution, however, this change has come with unforeseen challenges.

TOK America would like to work with you to identify ways to improve and better serve new employees' onboarding processes. Specifically, we would like to understand where we can change and improve our procedures and technology. A critical element to ensure that our needs assessment is successful will involve employees and managers' engagement.

We give Team TORX permission to use the name of our organization in the final report. Please deliver the report to me by April 16 (Sun), 2023.

I look forward to collaborating with you throughout this process.

Sincerely,



Melissa Stahl  
HR Generalist  
4600 NE Brookwood Pkwy  
Hillsboro, OR 97124  
Phone: (971) 297-7069  
Email: melissa.stahl@tokamerica.com

### Appendix 6: Needs Assessment Report Rubric

Criteria	Rating			
	Excellent	Good	Needs Improvement	Unsatisfactory/ No Submission
<b>Required Elements of the Report</b> - <i>Did you include all required elements of the 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 the 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.
<b>Organization and Logical Flow</b> - <i>Is the report well-organized? Does it have a logical flow?</i>	The report is well-organized, and ideas flow logically. 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 flow. Writing does not demonstrate any understanding of the data obtained from all sources. Or the report was not submitted.
<b>Clarity</b> - <i>Is the report written in ways that your client can easily understand?</i>	The report is well-written, clear, and free from grammar and spelling errors. Ideas are clearly stated for your client 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 your client to understand.	The report shows an average quality of writing. There are some errors in grammar and spelling. Most ideas are not well-stated for your client to understand.	The report shows a below average writing quality. There are frequent errors in spelling and grammar. Ideas are not stated for your client to understand. Or the report was not submitted.
<b>Consistency</b> – <i>Does the report show consistency in information presentation?</i>	The report shows consistency in information presentation (e.g., design considerations).	The report largely shows consistency in information presentation.	The report somewhat shows consistency in information presentation.	The report lacks consistency in information presentation.
<b>Professional Outlook</b> – <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.
<b>Attention to Detail</b> - <i>Did you follow the APA (7<sup>th</sup> 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 was not submitted.

## Appendix 7: Client Feedback Sample



### Digital Onboarding Needs Assessment Project Feedback (20/20)

#### Report (10/10)

- The report clearly indicates the purpose and factors used in the needs assessment.
- Data collection was accurate, and the various methods used to collect the qualitative data allowed for the team to identify many areas lacking in the digital onboarding.
- SWOT analysis correctly outlined strengths, weaknesses, opportunities, and threats and brought awareness on many items that have not been considered.
- Recommendations provided were reasonable and clearly stated. The added bonus was the detailed implementation steps!
- Overall, the report was very detailed and addressed many areas that our organization will utilize in improving our onboarding process.

#### Presentation (10/10)

- The team presented the information clearly and professionally.
- The power point was organized and outlined the scope of the assessment.
- The presenters were professional and articulated the information well.
- The slides provided great visual aids to summarize the data and made it simple to understand.

#### Final Summary

Team TORX did an exceptional job in their efforts to research, collect and analyze data, and in presenting their findings with recommendations that we were able to implement. The team was able to provide perspective that our organization had not considered through their needs assessment. They took this consultation seriously and worked together to deliver an outcome that not only has already improved our onboarding process, but ultimately has allowed our HR team to consider reassessment in other areas by utilizing this approach. I appreciated their willingness to gather the qualitative data in a variety of ways and for partnering with our team. They were extremely easy to work with and maintained their professionalism when speaking with each of our team members. This is a group that TOK America would indeed hire to assist us as real consultants and we look forward to the opportunity of working with them again.

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Oregon Plant / Headquarters  
4600 NE Brookwood Parkway, Hillsboro, Oregon 97124  
Tel (503) 693-7711 Fax (503) 693-2070

Corporate Sales Office  
190 Topaz Street, Milpitas, California 95035  
Tel (408) 956-9901 Fax (408) 956-9995

## 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)

<b>Preparation</b> 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				
<b>Participation &amp; Communication</b> Articulates ideas effectively when speaking or writing; submits papers without grammatical errors; listens to others; encourages others to talk; persuasive when appropriate			⬇	⬇
<b>Helps Group Excel</b> 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		⬇	⬇	⬇
<b>Team Player (Cooperation)</b> Knows when to be a leader and a follower; keeps an open mind; compromises when appropriate; can take criticism; respects others		⬇	⬇	⬇
<b>Member Name</b>	⬇ <b>Team Player</b>	⬇ <b>Helps Group Excel</b>	⬇ <b>Participation &amp; Communication</b>	⬇ <b>Preparation</b>
	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: \_\_\_\_\_