HRD 5328 Special Topics in HRD: Needs Assessment (21530)

Spring 2021

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), Associate Professor
Class Time:	Jan 11 – May 1 (Spring Break: The week of Mar 8 – no class)
Office Hours:	Tue & Thu at 3:30 pm – 5:00 pm CST (Other times by appointment through email)
Communication:	Canvas, emails, and Zoom
Course Access:	https://uttyler.instructure.com/courses/23079
Zoom:	https://uttlyer.zoom.us/my/yjcho

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COURSE DESCRIPTION

This course centers on concepts, cases, and practices of needs assessment in 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. 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 data collection and analysis methods as well as needs assessment methods (e.g., SWOT Analysis)
- To carry out a needs assessment project by applying assessment methods to a real organization
- To learn the balancing act of individual and teamwork activities to deliver quality work

CORE COPMETENCIES

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

- Identify performance needs in the organization by analyzing cases in point
- Practice data collection (e.g., interviews and surveys) and analysis methods (e.g., content analysis)
- Practice needs assessment methods (e.g., SWOT Analysis)
- Use a SWOT Analysis to perform a needs assessment of a client organization, collect and analyze data, create a report, and present findings and recommendations to the organization
- Reflect on lessons learned from individual and teamwork activities

COURSE OUTLINE

See Figure 1 for the needs assessment process that students must follow throughout the semester.

Figure 1
The Needs Assessment Process
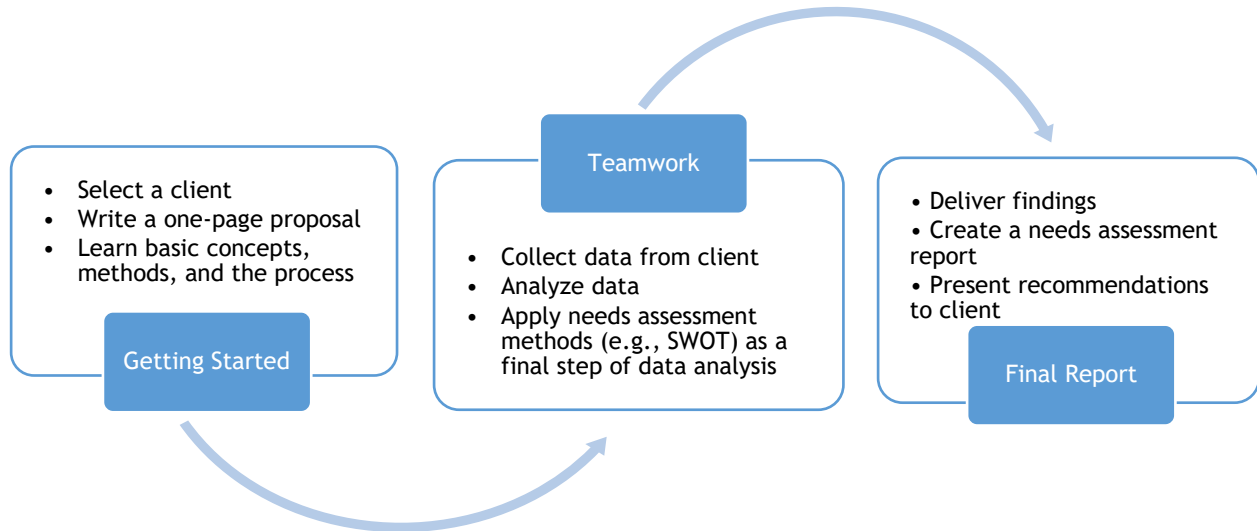
This course is composed of five units: introduction, basics, data collection and analysis, needs assessment methods (e.g., SWOT), and presentation and reflection.

Unit 1: Introduction

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

Unit 2: Basics

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

Units 3-4: Data Collection and Analysis

Learn and practice methods that are required for the needs assessment process including:

- Data collection (e.g., interviews and surveys) and data analysis methods (e.g., content analysis)
- Needs analysis methods (e.g., SWOT Analysis)

Unit 5: Synthesis - Presentation and Reflection

Deliver project findings and recommendations to the client:

- Present a draft report to class to gather feedback.
- Finalize a professional report.
- Present findings and recommendations to the client.

Write a reflection paper summarizing lessons learned throughout the semester.

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 regarding what to do in the week. In the first week, post your introduction in the 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., 2000[1]) indicates that students need synchronous meetings to feel "presence" in online classes. Due to the Covid-19 pandemic, however, we will have limited synchronous meetings via Zoom to clarify what needs to be done in class including:

- Orientation in the first week
- Team Clinic in Week 11
- Draft report presentation in Week 14

You are required to attend the orientation and draft presentation meetings. If you cannot make it to the orientation meeting, I will provide a Zoom recording so that you can visit whenever convenient. If you cannot make the draft presentation, you need to let me know in advance so that I can arrange an alternative presentation format (e.g., video). I will determine the most convenient times through Doodle surveys. I will also open weekly office hours via Zoom (https://uttyler.zoom.us/my/yjcho) on Tuesdays and Thursdays between 3:30 pm and 5:00 pm CST so that you can ask any questions related to course assignments and class activities.

TEAMWORK

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. Form a team of three students based on common interests (e.g., HRD, HRM), proximity (e.g., the same time zone), and diversity (e.g., gender, nationality), name the team for team building purposes, and set up ground rules for quality teamwork throughout the semester. To form quality teams, introduce yourself in the Discussion in the first week. To evaluate your teamwork, you will be asked to fill out a **peer evaluation form** (attached at the end) twice, at the mid-term and end of the semester. Based on the comparison of mid-term and final evaluation, I will provide you with development advice for teamwork.

FEEDBACK-BASED

This course is also based on constant, detailed feedback that I am going to provide throughout the semester. In the process, you will learn how to meet assignment requirements and improve writing using the APA formatting guidelines that are required in HRD. If you need extra help, reach out to me. To that end, use the following communication tools:

- If you want to have an individual meeting, send me an email at ycho@uttyler.edu. I don't mind meeting at night, if that is more convenient to you.
- When you send me an email, include "HRD 5328" in the subject line.
- If your message is urgent, include "Urgent" in the subject line.
- Take advantage of regular office hours via Zoom (https://uttyler.zoom.us/my/yjcho). If you don't show up in the first 15 minutes, I will leave. If you want to block out a time slot for a meeting, please let me know in advance.

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[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.

- If you need technical support, please contact the Help Desk for live chat at https://cases.canvaslms.com/liveagentchat?chattype=student or at +1-844-214-6949.

INSTRUCTOR EXPECTATION

Online teaching and learning is based on two-way communication between instructor and students. I expect that you are self-sufficient and aim at achieving learning goals that meet the quality standards at the master's level. It is YOU that should take responsibility of reaching the learning goals and completing all assignments and class activities. In the process, I will be there to provide you with constant and detailed feedback. If assignment guidelines are unclear, ask me clarifying questions. If you do not understand my evaluation, ask for my extra feedback until it makes sense. As this is the first required course in the master's degree in HRD at UT Tyler, I do hope that it will set the expectation for what to do (e.g., creation of a professional report) and what not to do (e.g., plagiarism) to establish an optimum quality of learning in the degree program. The bottom line is to learn as intended to become an informed HR(D) practitioner. To get there, be open to learn new and unfamiliar knowledge and skills (e.g., APA)!

ASSIGNMENTS AND DUE DATES

You are required to complete four deliverables: weekly discussion postings, a final project, class participation, and a reflection paper. Most assignments are due by **Mondays at 11:59 pm EST**.

	Topic (points)	Level	Points	Due
1	Weekly Discussion Postings	Individual	40	Weeks 1 to 8 (Answers by Wed. and Comments by Sat.)

2	Needs Assessment Project
	• Team's Ground rules (5)
	• Client Selection (5)
	• One-Page Proposal (10)
	• Permission Letter (5)
	• Progress Report (5)
	• SWOT Analysis (draft) (5)
	• Draft Presentation (20)
	  1. Draft Report (15)
	  2. Presentation (5)
	• Final Submission (15)
	  1. Final Report (10)
	  2. Transmission Letter (5)
	• Final Presentation to Client
	• Client Evaluation* (10)
		Team	80	1/25
				2/1
				2/8
				2/22
				3/15
				3/22
				4/12
				
				(TBA)
				4/19
				
				Week of 4/19
				4/26

3	Class Participation • Introduce Yourself (5) • Discussion Lead (5) • Peer Review of a Data Collection Instrument (5) • Peer Evaluation (mid-term & final) (2x5) • Class Evaluation (mid-term) (5)	Individual	30	**1/11 (Mon)** Week of your choice Until 3/29 3/1 & 4/26 3/1
4	Reflection Paper	Individual	10	4/26
	Total:		160	

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

Weekly Discussion Postings (40 pts)

I will post weekly discussion questions in Discussions (Canvas), and a discussion leader of a discussion group will lead the week's discussion. Post one **compact and pointed answer** to the discussion question by the end of **Wednesday** and two comments on other students' answers by the end of **Saturday.** Choose a week to play the role of discussion lead. **Discussion lead** is an excellent opportunity to take charge of a week's discussion. To lead a week's discussion, you are required to do the following:

- Read all required readings and optional readings
- Read all of your discussion group members' answers to the week's discussion question
- Respond to intriguing answers and ask probing questions for in-depth discussion
- To earn the full five points, you must be present to lead a discussion throughout the week

In the weekly posting and discussion lead process, students will develop critical thinking skills, as the founding father of action learning Reg Revans (2011) indicated in his learning formula[2], L (learning) = P (programmed knowledge) + Q (questioning). I will review the quality and quantity of your postings each week and provide immediate feedback individually if you did not meet the posting requirements, after the first due date (Wed.), so that you can revise their answers as directed by the second due date (Sat.) (see **Appendix 1 for the postings rubric**).

In this course, meeting the **APA formatting guidelines**[3] (2020) is required because it is the writing style required in HRD at UT Tyler. To get used to it, follow the instructions on APA in Canvas Files and see how I referenced publications in this syllabus. You must follow the APA style in all writing assignments in this course.

Needs Assessment Project (80 pts)

Work in teams of three students. The final project is an outstanding opportunity to apply the concepts, principles, and methods of needs assessment you learned to a real organization. To that end, go through the following steps:

- Select a client who is interested in working with you to assess performance needs in the organization. Your client can be a company, non-profit organization, university unit, school, small startup, or the military. For effective communication, choose an organization that you know and which is willing to collaborate with you throughout. You may choose your (or your team member's) organization.
- In an **initial meeting** with your client, identify the organization's urgent needs and gather background information. In this meeting, you should clarify what you can do and what not (called "frame factors") to clearly set the expectations for both parties. In other words, do not be too ambitious, particularly in this Covid-19 pandemic.
- On the basis of the information acquired from the initial meeting, write a **one-page proposal** in which you will clearly state the project 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, and a (tentative) schedule and division of labor about who will be doing what. See **Appendix 2 for the one-page proposal rubric** and **Appendix 3 for the one-page proposal sample**.
- I will provide detailed feedback on the quality of the proposal. It will take a couple of rounds of the revision process. Because a one-page proposal will serve as an informal contract for your client, I have a high expectation for you to make it professional. When I say "revise and resubmit," do not get discouraged. You will be satisfied with the quality of the final proposal, and it will be shared with your client who will feel the "wow factor."

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[2] Revans, R. (2011), *ABC of action learning*, Surrey, UK: Gower.
[3] American Psychological Association. (2020). *Publication manual of the American Psychological Association: The official guide to APA style* (7th ed.). American Psychological Association.

- Follow the steps specified 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 mantra is: The more data, the better credibility. However, in this Covid-19 pandemic, I will understand if you use limited data collection and analysis methods.
- Use a **SWOT Analysis** as the final step of data analysis and deliver findings and recommendations.
- Write a **single-spaced draft report** with no more than 10 pages, appendices and references, including the following:

  - Cover page (title)
  - (one-page) Executive Summary
  - Acknowledgements
  - Table of Contents
  - Introduction: Purpose (scope), context (background and problem), and frame factors (i.e., project-, organization-, and consultant-wise). **The main page number begins on this page.**
  - Project Methodology: The data collection and analysis process. A **literature review** on the project topic is the first step to follow before collecting data.
  - **SWOT Analysis**: Internal (strengths and weaknesses) and external (opportunities and threats) analysis as the final data analysis
  - Positive and negative findings: List findings consecutively to be referred to in recommendations
  - Recommendations: Each recommendation with its own rationale and critical success factors
  - Appendices: Appendix A: One-Page Proposal, Appendix B: Permission Letter, and more
  - References: A list of references used in the litereture review. This will be located at the end.

In **the week of April 12**, teams are scheduled to **present a draft report** via Zoom and receive feedback from me and classmates. After the draft presentation, teams are required to ask for their client's feedback on findings and recommendations, finalize the draft report, submit it to me and the client (due: April 19), and present findings and recommendations to their client as scheduled in the week of April 19. The **final report** should be written in a compact and pointed manner so that clients can easily understand (see **Appendix 4 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) efforts to ensure the project's validity and reliability, (d) consistency (e.g., design considerations), (e) attention to detail (e.g., APA formatting guidelines), and (f) professional outlook (e.g., no running text). Final report samples will be available in Files.

At the end of the semester, I will ask for **client feedback** (10 pts) on the quality of the report and final presentation as well as teamwork (see **Appendix 5 for the client feedback sample**).

Class Participation (30 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) (see **Appendix 6 for the peer evaluation form**), (d) evaluate the course (mid-term), and (e) peer-review a team's data collection instrument (e.g., interview questions or survey questionnaire).

Reflection Paper (10 pts)

Write a (single-spaced, three-page) reflection paper. This end-of-class reflection paper should include lessons learned from class activities and project-based team learning. The paper should include: (a) a title, purpose, and introduction, (b) key points of lessons learned from class activities and the final project process, and (c) the conclusion with suggestions.

FINAL GRADES

Grade	A	B	C	D	F
Range	100% to 90%	< 90% to 80%	< 80% - 70%	< 70% to 60%	< 60% to 0%
Range (pts)	Over 144	128-143	112-127	96-111	Below 95

GRADING GUIDELINES

To complete assignments, see Assignment Guidelines in Canvas. I will provide feedback on each assignment. Ensure that you understand evaluation criteria before beginning an assignment. No incompletes will be awarded unless there is an emergency (e.g., the Covid-19 pandemic). 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 learner's provider and/or UT Tyler's system prevents the student from submitting a discussion post, assignment, quiz, or exam. The student is responsible for contacting the instructor, providing evidence of the outage and submitting any missed work within 24 hours of resolution of any system outage.

Academic Dishonesty Statement

The faculty expects from its 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 the guidelines established by the University.

UNIVERSITY POLICIES

The University of Texas at Tyler Honor Code

Every member of the UT Tyler community joins together to embrace: Honor and integrity that will not allow me to lie, cheat, or steal, nor to accept the actions of those who do.

Students Rights and Responsibilities

To know and understand the policies that affect your rights and responsibilities as a student at UT Tyler, please follow this link: https://www.uttyler.edu/wellness/rightsresponsibilities.php

Grade Replacement/Forgiveness

Students repeating a course for grade forgiveness (grade replacement) must file a Grade Replacement Contract with the Enrollment Services Center (ADM 230) on or before the Census Date of the semester in which the course will be repeated. (For Spring, the Census Date is Jan. 28.) Grade Replacement Contracts are available in the Enrollment Services Center or at http://www.uttyler.edu/registrar. Each semester's Census Date can be found on the Contract itself, on the Academic Calendar, or in the information pamphlets published each semester by the Office of the Registrar.

Census Date Policies

The Census Date (January 25) is the deadline for many forms and enrollment actions that students need to be aware of. These include:

- Submitting Grade Replacement Contracts, Transient Forms, requests to withhold directory information, approvals for taking courses as Audit, Pass/Fail, or Credit/No Credit.
- Receiving 100% refunds for partial withdrawals. (There is no refund for these after the Census Date).
- Schedule adjustments (section changes, adding a new class, dropping without a "W" grade)
- Being reinstated or re-enrolled in classes after being dropped for non-payment.
- Completing the process for tuition exemptions or waivers through Financial Aid.

State-Mandated Course Drop Policy

Texas law prohibits a student who began college for the first time in Fall 2007 or thereafter from dropping more than six courses during their entire undergraduate career. This includes courses dropped at another 2-year or 4-year Texas public college or university. For purposes of this rule, a dropped course is any course that is dropped after the census date (See Academic Calendar for the specific date). Exceptions to the 6-drop rule may be found in the catalog. Petitions for exemptions must be submitted to the Enrollment Services Center and must be accompanied by documentation of the extenuating circumstance. Please contact the Enrollment Services Center if you have any questions.

Disability Services

In accordance with Section 504 of the Rehabilitation Act, Americans with Disabilities Act (ADA) and the ADA Amendments Act (ADAAA) the University offers accommodations to students with learning, physical and/or psychiatric disabilities. If you have a disability, including non-visible disabilities such as chronic diseases, learning disabilities, head injury, PTSD or ADHD, or you have a history of modifications or accommodations in a previous educational environment you are encouraged to contact the Student Accessibility and Resources office and schedule an interview with the Accessibility Case Manager/ADA Coordinator, Cynthia Lowery Staples. If you are unsure if the above criteria applies to you, but have questions or concerns please contact the SAR office. For more information or to set up an appointment please visit the SAR office located in the University Center, Room 3150 or call 903.566.7079. You may also send an email to cstaples@uttyler.edu.

Student Absence due to Religious Observance

Students who anticipate being absent from class due to a religious observance are requested to inform the instructor of such absences by the second class meeting of the semester.

Student Absence for University-Sponsored Events and Activities

If you intend to be absent for a university-sponsored event or activity, you (or the event sponsor) must notify the instructor at least two weeks prior to the date of the planned absence. At that time the instructor will set a date and time when make-up assignments will be completed.

Social Security and FERPA Statement

It is the policy of The University of Texas at Tyler to protect the confidential nature of social security numbers. The University has changed its computer programming so that all students have an identification number. The electronic transmission of grades (e.g., via e-mail) risks violation of the Family Educational Rights and Privacy Act; grades will not be transmitted electronically.

Student Standards of Academic Conduct

Disciplinary proceedings may be initiated against any student who engages in scholastic dishonesty, including, but not limited to, cheating, plagiarism, collusion, the submission for credit of any work or materials that are attributable in whole or in part to another person, taking an examination for another person, any act designed to give unfair advantage to a student or the attempt to commit such acts.

"Cheating" includes, but is not limited to: copying from another student's test paper; using, during a test, materials not authorized by the person giving the test; failure to comply with instructions given by the person administering the test; possession during a test of materials which are not authorized by the person giving the test, such as class notes or specifically designed "crib notes". The presence of textbooks constitutes a violation if they have been specifically prohibited by the person administering the test; using, buying, stealing, transporting, or soliciting in whole or part the contents of an un-administered test, test key, homework solution, or computer program; collaborating with or seeking aid from another student during a test or other assignment without authority; discussing the contents of an examination with another student who will take the examination; divulging the contents of an examination, for the purpose of preserving questions for use by another, when the instructors has designated that the examination is not to be removed from the examination room or not to be returned or to be kept by the student; substituting for another person, or permitting another person to substitute for oneself to take a course, a test, or any course-related assignment; paying or offering money or other valuable thing to, or coercing another person to obtain an un-administered test, test key, homework solution, or computer program or information about an un-administered test, test key, home solution or computer program; falsifying research data, laboratory reports, and/or other academic work offered for credit; taking, keeping, misplacing, or damaging the property of The University of Texas at Tyler, or of another, if the student knows or reasonably should know that an unfair academic advantage would be gained by such conduct; and misrepresenting facts, including providing false grades or resumes, for the purpose of obtaining an academic or financial benefit or injuring another student academically or financially.

"Plagiarism" includes, but is not limited to: the appropriation, buying, receiving as a gift, or obtaining by any means another's work and the submission of it as one's own academic work offered for credit. All written work that is submitted will be subject to review by plagiarism software.

"Collusion" includes but is not limited to: the unauthorized collaboration with another person in preparing academic assignments offered for credit or collaboration with another person to commit a violation of any section of the rules on scholastic dishonesty.

UT Tyler Resources for Students

- **UT Tyler Writing Center** (903.565.5995), writingcenter@uttyler.edu
- **UT Tyler Tutoring Center** (903.565.5964), tutoring@uttyler.edu
- The Mathematics Learning Center, RBN 4021, this is the open access computer lab for math students, with tutors on duty to assist students who are enrolled in early-career courses.
- **UT Tyler Counseling Center** (903.566.7254)

Other Information: What to do in a Crisis:
24/7 Crisis Line: 903.566.7254   What to Do in a Crisis Webpage: https://www.uttyler.edu/counseling/emergencies.php

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 College of Business and Technology 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 and Technology 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.

TEXTBOOKS AND RESOURCES

No textbook is required. Journal articles and book chapters are available via Canvas (Files). All references follow APA formatting guidelines (APA, 2020).

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

Recommended:

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

REQUIRED READINGS

WEEK 1 (1/11 - 1/17) – 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 (1/18 - 1/24) – 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.
Optional:
ATD Research. (2018). *Needs assessments: Design and execution for success* [White paper]. https://www.td.org/research-reports/needs-assessments

WEEK 3 (1/25 – 1/31) – Basics 2

Altschuld, J. W. (2004). Emerging dimensions of needs assessment. *Performance Improvement, 43*(1), 10-15.

Case 1:
Kalman, H. K. (2016). Integrating evaluation and needs assessment: A case study of an Ergonomics program. *Performance Improvement Quarterly*, *29*(1), 51-69.

WEEK 4 (2/1 – 2/7) – 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.
Case 2:
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.

WEEK 5 (2/8 – 2/14) – Data Collection and Analysis

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.
Case 3:
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.

WEEK 6 (2/15 – 2/21) – Interviews

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.
Case 4:
Doane, E., & Cumberland, D. M. (2018). Community policing: Using needs assessment to gain understanding before implanting. *Performance Improvement Quarterly*, *31*(2), 165-187.

WEEK 7 (2/22 – 2/28) - 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.
Case 5:
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.
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.
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 8 (3/1 – 3/7) – Needs Assessment Methods: SWOT Analysis

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.
Case 6:
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.

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.

<mark>**HRD 5328 COURSE SCHEDULE**</mark> (May change depending on the circumstances)[4]

Unit	Week	Topic	Reading	Assignment/Activity
U1 (Intro)	1 (1/11-1/17)	**Orientation** (via Zoom)	Parker (2006)	▪ **Introduce yourself** (1/11) ▪ **Weekly postings** (Answers by Wed. and comments by Sat.)
U2 (Basics)	2 (1/18-1/24)	Basics 1	Rossett (2009); Sleezer et al. (2014a, 2014b)	**Team formation**
	3 (1/25–1/31)	Basics 2 Case study 1	Altschuld (2004); Kalman (2016)	**Ground rules** (1/25)
	4 (2/1–2/7)	Ethical Issues Case study 2	Sleezer et al. (2014); Stefaniak et al. (2015)	**Client selection** (2/1) (Call for an initial meeting with client to set the expectations for the final project)
U3 (Data Collection)	5 (2/8–2/14)	Data Collection & Analysis Case study 3	Aull et al. (2016); Sleezer et al. (2014)	**One-page proposal** (2/8)
	6 (2/15–2/21)	Interviews Case study 4	Doane & Cumberland (2018); Russ-Eft & Preskill (2009)	I will attend the 2021 AHRD Conference (virtual)
	7 (2/22–2/28)	Surveys Case study 5	Russ-Eft & Preskill (2009); Swart & Kaufman (2009)	▪ **Permission letter** (2/22) ▪ **Peer review of a data collection instrument** (until 3/29)
U4 (Data Analysis)	8 (3/1–3/7)	NA Method: SWOT Analysis Case study 6	Cho et al. (2020); Leigh (2010)	**Mid-term evaluation** (peer and class) (3/1)
	9 (3/8 – 3/14)	**Spring Break (no class)**		
	10 (3/15–3/21)	Critical Success Factors Draft Presentation: Guidelines		**Progress report** (3/15)
	11 (3/22–3/28)	**Team Clinic** (I will visit teams to see progress)		**SWOT Analysis (draft)** (3/22)
U5	12 (3/29–4/4)	**Project Work 1** (All teams work on their final project)		
	13 (4/5–4/11)	**Project Work 2** (All teams work on their final project)		
	14 (4/12–4/18)	**Draft Presentation**		**Draft report & presentation** (4/12) (*Ask for client feedback on

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[4] <mark>I will keep you informed about the syllabus with the date updated, as in the syllabus-1-5.</mark>

(Synthesis)		(via Zoom)	recommendations before finalizing your report)
	15 (4/19–4/25)	• Final Submission to me and client • Final Presentation to client in the week	**Final report & transmission letter** (4/19)
	16 (4/26–5/1)	Reflection	• **Client evaluation (4/26)** • Final peer evaluation (4/26) • Reflection paper (4/26) • Course evaluation

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 on Canvas	One of the posts was posted after the deadline on Canvas	Posts were posted after the deadline on Canvas, or posts were missing/not submitted
Citing two required readings in the week's answer	Required two readings were cited in the week's answer	Only one of the required two readings was 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 pointed way and following the APA style (7th ed.)	Writing followed the APA style and was compact and pointed	Writing did not follow the APA style or was not compact and pointed	Writing did not follow the APA style and was not compact and pointed, or posts were not submitted

Appendix 2: 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 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 written in a bit longer than one page, violating the requirement.	The proposal is written in 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.

R621 Assignment 3 - Proposal   **(JS)² Instructional Consultant**

Increasing Teacher Use of Canvas for Grades K-2 in Batesville Community School Corporation

Purpose: The purpose of this project is to analyze the current state of teacher use of technology, in particular, the learning management system Canvas, so that our team can recommend practical solutions to help the school increase teachers' use of technology, and further promote student learning outcomes.

Rationale: The school corporation has helped teachers effectively use various technology for instruction by providing workshops and conducting an annual teacher survey, but the results have not been quite satisfactory. Specifically, Canvas has been used for the last 5 years, and it is time to conduct a needs assessment to determine the reason(s) for the low rate of Canvas usage and find practical solutions to promote teacher use.

Key Stakeholders: Key stakeholders include administrators, staff, teachers, students, and parents in Batesville Community School Corporation.

Frame Factors: Primary frame factors are time, place, and communication method. First, the timeframe to conduct this research is limited (approximately 3 months). Next, all team members, and our clients, live in different time zones, which adds difficulty in working together and collecting data from the clients. Lastly, unreliable internet connections may be a barrier to communicating in a timely manner.

Data Collection and Analysis Methods: To understand the target context, the team will conduct a literature review on applying technology to education, and the use of Canvas for education. A document review of data previously collected by the clients includes an annual teacher survey and rate of technology usage in the classroom. The team will conduct a survey for all K-2 grade teachers (approximately 22), and also interview a small sample group of K-2 teachers to collect more qualitative data. The survey data will be analyzed using descriptive statistical analysis, interviews will be collated through content analysis, and all collected data will be synthesized using SWOT analysis.

Project Schedule and Division of Labor

Task/Major Milestone	Date Due	Key individuals/Leader
Client Selection	9/9/19	Team
Initial Client Meeting	9/13/19	Jackie
Project Proposal	9/16/19	Sunmi
Permission Letter	9/30/19	Jackie
Data Collection: a. Literature review b. Document review c. Interview d. Survey questionnaire	10/7/19 10/7/19 10/7/19 10/7/19	a. Justin b. Sarah c. Jackie d. Sunmi
Data Analysis: a. Content analysis of the interview data b. Descriptive statistical analysis of the survey data c. SWOT analysis	10/10/19 10/10/19 10/14/19	a. Jackie b. Sunmi c. Sarah & Justin
Submit Progress Report	10/21/19	Sarah
Submit Draft Report and Presentation	11/18/19 & 11/20/19	Sunmi
Collect Client Feedback on findings and recommendations	Week of 11/18/19	Jackie
Submit Final Report to Dr. Cho and Client	12/2/19	Justin
Final Presentation to Client	Week of 12/4/19	Sarah

Appendix 4: Needs Assessment Report

Rubric

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

Appendix 5: 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 form 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 6: Peer Evaluation Form

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

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

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

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

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

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

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

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 and myself.

Signature: _____   Date: _____