

HRD 5308 Needs Assessment in HRD (20691)
Spring 2026

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

"No, you don't get an A for effort" ([Grant, 2024](#))

Instructor:	Dr. Yonjoo Cho (ycho@uttyler.edu), Professor
Class Time:	1/12 – 4/26 (Spring Break: Week of 3/9)
Orientation:	1/12 (Mon) at 7:00 pm CT via Zoom
Office Hours for Individual Clinics:	Monday & Wednesday at 7:00 pm to 9:00 pm – Reserve a 30-minute slot for an individual clinic via a Google Doc at Home
Team Clinics:	Week 2, Week 6, and Week 12
Draft Report Presentation:	4/14 (Tue) at 7:00 pm CT via Zoom
Final Presentation to Client:	Week 15
Communication:	Canvas, emails, and Zoom
Course Access:	https://uttyler.instructure.com/courses/51316
Zoom:	https://uttyler.zoom.us/my/yjcho

COURSE DESCRIPTION

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

COURSE GOALS

The goals of the course are:

- 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 the last step of data analysis in the needs assessment process
- To conduct 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 grasp the gist of needs assessment in HRD fully

CORE COMPETENCIES

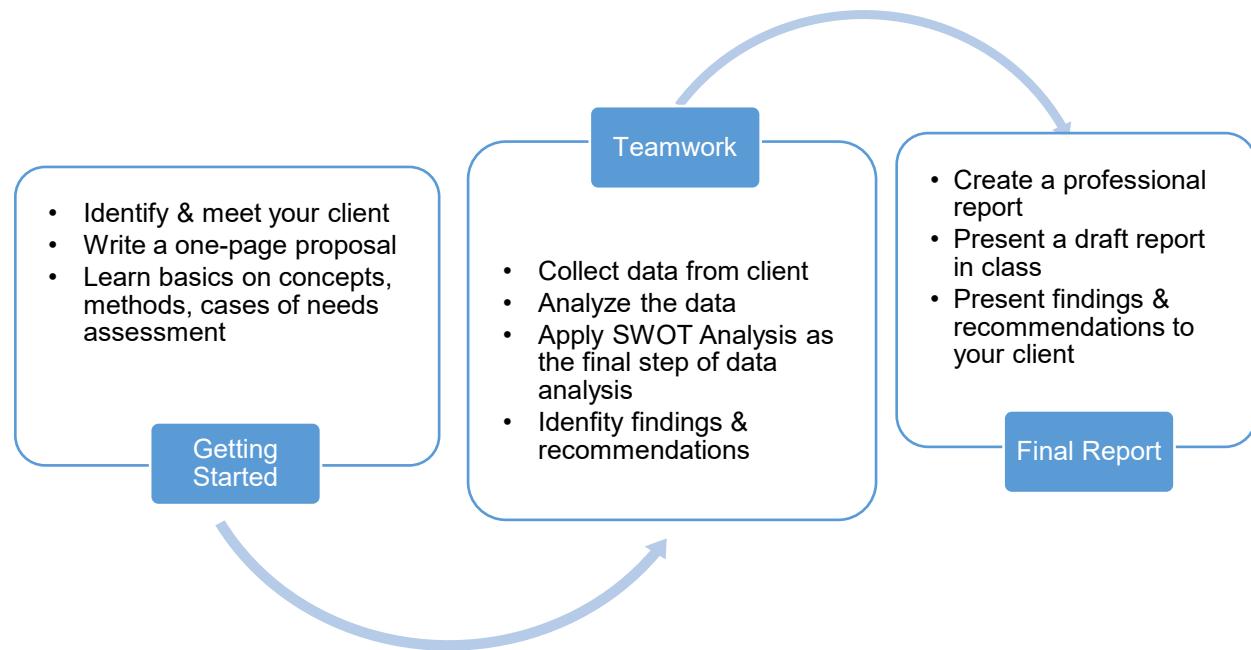
By the end of the semester, students will be able to:

- 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 SWOT Analysis as the final step of data 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 last step of data analysis.
 - Create a final report and present findings and recommendations to the client.
- Develop communication skills from collaborating with team members, the instructor, and the client, 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 need to follow:

Figure 1
The Needs Assessment Process



This course is composed of five units: introduction, basics, data collection, data analysis (SWOT Analysis as the last step), and synthesis (draft, 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 in a needs assessment process:

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

Unit 5: Synthesis - Presentations and Reflection

Present findings and recommendations in class (draft presentation) and to the client (final presentation):

- Present a draft report to the class to gather feedback from classmates and me.
- Solicit the client's feedback on findings and recommendations.
- Finalize a professional report.
- Present findings and recommendations in the final report to the client.

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

READ ME FIRST (Canvas Modules)

This is where you begin each week by reading a Read Me First page that guides you on what to do in the new week. It will be posted by Saturday at 9:00am CT.

SYNCHRONOUS MEETINGS

Research on online teaching and learning (e.g., Garrison et al., 2000¹) indicates that students need synchronous meetings to feel **presence** in online classes. To that end, we will have [Zoom](#) meetings for individual and team clinics to discuss class assignments:

- Orientation on 1/12 at 7:00 pm CT
- Office hours for individual clinics: Monday & Wednesday between 7:00 pm and 9:00 pm – Reserve a 30-minute slot for an individual clinic via a Google Doc at Home
- Team clinics: Week 2, Week 6, and Week 12
- Draft report presentation on 4/14 (Tue) at 7:00 pm CT to receive feedback from classmates and me. You may use this as a rehearsal before the final presentation to the client.

¹ Garrison, D. R., Anderson, T., & Archer, W. (2000). Critical inquiry in a text-based environment: Computer conferencing in higher education. *The Internet and Higher Education*, 2(2-3), 87-105. [https://doi.org/10.1016/S1096-7516\(00\)00016-6](https://doi.org/10.1016/S1096-7516(00)00016-6)

INDIVIDUAL AND TEAM WORK

This course consists of individual work (41%) and team-based project learning (59%), as many business courses are team-based project learning, so students work in teams as well as individually. For teamwork:

- I've randomly assigned you to a team of four students, based on the past students' feedback on the difficulty of choosing team members in the first week.
- Name your team for team building purposes. Be creative! 😊
- Establish the ground rules for quality teamwork (see Appendix 2 for a sample). To evaluate both your and your team members' teamwork, I will ask you to complete a peer evaluation form (see Appendix 8) twice: at mid-term and at the end of the semester. At mid-term, revisit your ground rules to refresh your teamwork. Your team contribution points (out of 10) will be converted from your average peer evaluation score (out of 4).

CLIENT INVOLVEMENT

In this course, client involvement is essential, as it is instrumental in helping students apply what they learn in class to a real organization, enabling student teams to provide evidence-based findings and recommendations. Here are four client selection criteria:

- Fit: Do your client's needs fit the objective of your needs 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 (a major stakeholder) always available to assist you?

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. I will ask the client to evaluate the quality of your project work: qualitative details and quantitative evaluation (out of 20 points) at the end of the semester.

FEEDBACK-BASED

Research indicates that team-based project learning is not possible without the instructor's timely feedback; therefore, I will provide quick and detailed feedback to help you move forward as planned. In the process, you will learn to meet assignment requirements, develop critical thinking skills, and improve your writing as a graduate student, using APA formatting guidelines as required in HRD and the College of Business at UT Tyler. If you need help, reserve a slot on a Google Doc at Home.

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 graduate level. It is YOU who should take responsibility for achieving the set learning goals and for completing all assignments and class activities on time. At each step of the process, I will be there to provide you with prompt, detailed feedback. If assignment guidelines are unclear to you, ask for clarification. If you don't understand my evaluation comments, ask for extra feedback. As this is my flagship course that I have taught since 2008, I hope it clearly sets 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**, a needs analyst, or a needs assessor in diverse contexts. To achieve this goal, please be willing to learn the required competencies as a graduate student, including writing a one-page proposal, using SWOT Analysis, and APA writing style. A critical success factor is communication, communication, and communication!

ASSIGNMENTS AND DUE DATES

Complete four assignments in this course: 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 should be completed by **Sunday at 11:59 pm CT**, except for weekly postings: an answer by Wednesday and two comments by Saturday.

Assignments	Level	Points (%)	Due	
Weekly Discussion Postings (10 pts x 8 weeks)	Ind	80 (22)	Weeks 1, 2, 3, 4, 6, 7, 8, & 10: 1 answer by Wed & 2 comments by Sat	
Needs Assessment Project (15 Steps)	Team	220 (59)	1. Team formation by the instructor	
			done	
			2. Team ground rules (10)	
			1/18	
			3&4. Client Selection and Initial Meeting (10)	
			2/1	
			5. One-page proposal (30)	
			2/8	
			6. Permission letter (10)	
			2/15	
			7. Progress report (30)	
			3/22	
			8. SWOT Analysis (draft) (20)	
			3/29	
			9. Team Clinic 3	
			Week of 3/30	
			10. Draft Report (30) & ppt file	
			4/12	
			11. Draft Presentation (20)	
			4/14 at 7:00pm	
			12. Client feedback on findings and recommendations after draft presentation	
			Week of 4/13	
			13. Final Report (30) & transmission letter (10)	
			4/19	
			14. Final presentation to client	
			Week of 4/20	
			15. Client evaluation (20) (Note: I will solicit this for you!)	
Class Participation Activities	Ind	50 (14)	Introduce Yourself (10)	
			1/12 (Mon)	
			Discussion lead (20)	
			(Your choice)	
			Team contributions from mid-term & final peer-evaluations (10x2)	
Reflection Paper		Ind	20 (5)	
		Total	4/26	
		370 (100)		
Bonus Points: I will award a bonus point for providing feedback on a team's pilot survey, and you may receive up to 3 bonus points by reviewing 3 teams' pilot surveys.				

WEEKLY DISCUSSION POSTINGS (80 pts)

You will develop an understanding of concepts, principles, and cases of needs assessment in the first nine weeks of the semester through reading two required readings, except in Week 3, when a single reading is required. Each week, I will post a discussion question on Canvas Discussion, and a discussion leader of a discussion group – either HRM or HRD – will lead the week's discussion.

Post one compact and pointed answer **within three sentences** by the end of **Wednesday**, and two comments on other students' answers by the end of **Saturday**. This assignment is worth **10 points** each week: **8 points for an answer and 2 (1x2) points for two comments (see Appendix 1 for the postings rubric)**. In commenting, don't just say "yes" or "no" and add the reasons why you say "yes" or "no" to receive one point for one comment. See the following, compact and pointed sample answer:

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

Sample answer: Sleezer et al. (2014) defined needs assessments as assessing existing key issues to reach a desired outcome by determining strategies to bridge this gap. Ruff-Eff and Sleezer (2020) emphasized that needs assessment is a thorough process to close learning and performance gaps, which requires team collaboration, a complete comprehension of data collection, and ongoing consultations. Based on the two readings, I define needs assessment as identifying current problems and taking action toward where you want to be in an organization or community (quoted from Angelica Reyes, 2024).

A discussion leader will lead the week's discussion. Choose a week to play a discussion lead role and write down your choice on this [Google Doc](#). **Discussion lead** is an excellent opportunity to manage a week's discussion so that you learn how to deepen your knowledge on the week's topic and to ask probing questions to engage students in an in-depth discussion. This assignment has been highly valued by students in previous years. As a discussion leader:

- Read all required and optional readings.
- Read all student postings.
- Respond to interesting or intriguing postings, provide thoughtful feedback, and ask probing questions for in-depth discussion.
- To earn the full 20 points in this assignment, you must be present in the week for a minimum of three days and provide approximately 10 postings total.
- Avoid leading the discussion on Saturday afternoon as students are not actively engaged.

In weekly discussions, students will better understand concepts and principles of a needs assessment and develop critical thinking skills:

- I will provide feedback on your postings if you didn't meet the posting requirements on Thursday morning, so that you can revise your answer by **Saturday**.
- I suggest you post your answer and two comments early so that you can actively engage in discussion.
- I also suggest you do not add References at the end of your compact and pointed answer—unless there are new readings cited—to save space.

NEEDS ASSESSMENT PROJECT (220 pts)

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

- Form a team of 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, a university unit, a school, a small startup company, 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 you cannot (called "frame factors") to set the same expectations for both clearly. In other words, don't be too ambitious about the project outcomes, as you have limited time and resources.
- Based on the information gathered from the initial meeting, write a **one-page proposal**:
 - 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 is 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. You may have to revise it until I say **yes**. You will share the final proposal with your client to obtain a signed permission letter from your client (see **Appendix 5** for the permission letter sample).
- Follow the steps to 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 more data you collect, the better for credibility.
- Use a **SWOT Analysis** as the final step of data analysis and present findings and recommendations.
- Once you go through all steps, write a single-spaced, ten-page **draft report**, except appendices and references. The key components of the report include:
 - The cover page includes a project title, the course title, submission date, and team member names.
 - A one-page Executive Summary outlines the report.
 - Acknowledgements include all key stakeholders' full names to express appreciation for their assistance.
 - Table of Contents (TOC) includes the main body, appendices, and references, along with page numbers. Do not add the front matter (Executive Summary and Acknowledgements) in the TOC!
 - **Introduction (p. 1)** includes the purpose statement (scope), information about the context (background), and frame factors (project-, organization-, and consultant-wise). The main page numbering begins on this page.
 - 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.
 - **SWOT Analysis**, as the last step of data analysis, includes **internal** strengths and weaknesses and **external** opportunities and threats. Provide a figure of SWOTs, listing bullets in four cells.
 - 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.
 - Recommendations include implementation steps and critical success factors. Each

- recommendation should refer to related findings to provide evidence.
- Appendices include extra information you developed, as in Appendix A: One-Page Proposal and Appendix B: Permission Letter.
- References are located at the end to evidence that you reviewed the literature on the project topic.

In the **draft presentation on April 14 in Week 14**, teams highlight their draft report via Zoom and receive feedback from the instructor and classmates. This has been extremely helpful as it is a rehearsal before a final presentation to the client, and teams can see how other teams are doing as well. After the draft presentation is over, teams should 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 the client and me (due: **April 19**), along with a transmission letter, and present findings and recommendations to the client as scheduled in the week of April 20. 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).

Your report will be evaluated based on the following criteria: (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).

Once your final presentation is over, I will ask for a 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). Final report samples, depending on the sector, are available on Canvas Files.

CLASS PARTICIPATION ACTIVITIES (50 pts)

Actively participate in class activities: (a) your introduction, (b) discussion lead, and (c) peer evaluation at the mid-term and final (see **Appendix 8** for the peer evaluation form).

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-based project work. To that end, include: (a) a title, purpose, and introduction, (b) key points of lessons learned, and (c) suggestions/conclusions. To that end, create the title of the reflection paper to aptly sum up your learning experience!

GRADING GUIDELINES

See the Assignment Guidelines on Canvas to ensure that you understand the evaluation criteria before beginning to work on an assignment. No incomplete will be given unless there is an emergency (e.g., pregnancy). In case of a **late submission**, one point will be deducted per day. To receive no penalty for late submission, you must inform me of the reason why you need an extension or are incomplete **in advance**.

COURSE POLICIES

Artificial Intelligence (AI) Use

UT Tyler is committed to exploring and using artificial intelligence (AI) tools as appropriate for the discipline and task undertaken. We encourage discussing AI tools' ethical, societal, philosophical, and disciplinary implications. All uses of AI should be acknowledged as this aligns with our commitment to honor and integrity, as noted in UT Tyler's Honor Code. Faculty and students must not use protected information, data, or copyrighted materials when using any AI tool. Additionally, users should be aware that AI tools rely on predictive models to generate content that may appear correct but is sometimes shown to be incomplete, inaccurate, taken without attribution from other sources, and/or biased. Consequently, an AI tool should not be considered a substitute for traditional approaches to research. You are ultimately responsible for the quality and content of the information you submit. Misusing AI tools that violate the guidelines specified for this course (see below) is considered a breach of academic integrity. The student will be subject to disciplinary actions as outlined in the Academic Integrity Policy.

In this course, AI is not permitted at all. I expect all work students or student teams submit for this course to be their own. I have carefully designed all assignments and class activities to support your learning. Doing your own work, without human or artificial intelligence assistance, is best for your efforts in mastering course learning objectives. In this course, I forbid using ChatGPT or any other AI tools for any stages of the work process. Deviations from these guidelines will be considered a violation of UT Tyler's Honor Code and academic honesty values.

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 that 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

Mini Lectures

Mini lectures on APA formatting guidelines, postings, client selection, one-page proposal, the needs assessment project process, data collection and analysis, and SWOT Analysis are posted in Canvas Files.

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. In this course, you must follow the APA (2020)². In all writing assignments, follow the APA formatting guidelines as it is required in the UT Tyler HRD MS and College of Business. Follow the basics of APA on Canvas Files and see how I referenced publications in this course 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 in a compact and pointed manner.

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) online.

HRD Masterclass Podcast Series ([hrdmasterclass.com](#))

This is developed by the [AHRD](#) and explores the fundamentals of HRD and how those are changing in the workplace. The first four seasons have explored 44 different aspects of HRD and featured 110+ leading authors, scholars and researchers from around the globe. This is an outstanding resource to understand the most current topics and foundations of HRD.

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

TEXTBOOKS: No textbook is required

Recommended:

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.

FIVE NEEDS ASSESSMENT CASES

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

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]

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]

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]

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]

REQUIRED READINGS: All weekly readings are posted in Canvas Files titled “weekly readings”

Week 1 (1/12-1/18) – What makes a team effective?

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* (2nd ed., pp. 203-239). Pfeiffer.

Week 2 (1/19-1/25) – Basics 1

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.

The following two chapters are combined as one reading:

Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014a). Overview of needs assessment. In *A practical guide to needs assessment* (3rd ed., pp. 15-33). Wiley.
Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014b). Ideas and models that guide practice. In *A practical guide to needs assessment* (3rd ed., pp. 35-49). Wiley.

Week 2 – Optional

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

Week 3 (1/26-2/1) – 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 (2/2-2/8) – Ethical Issues & Case 1

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

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

Week 4 – Optional

AHRD Ethics Taskforce. (2018). *AHRD standards on ethics and integrity* (2nd ed.). [https://cdn.ymaws.com/www.ahrd.org/resource/resmgr/bylaws/AHRD_Ethics_Standards_\(2\)-fe.pdf](https://cdn.ymaws.com/www.ahrd.org/resource/resmgr/bylaws/AHRD_Ethics_Standards_(2)-fe.pdf)

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 (2/9-2/15) – The instructor's participation in the 2026 AHRD Conference in Irving, Texas (no class)

Week 6 (2/16-2/22) - Data Collection and Analysis & Case 2

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

Sleeker, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014). Strategies for collecting and analyzing data. In *A practical guide to needs assessment* (3rd ed., pp. 51-85). Wiley.

Week 6 – 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 7 (2/23-3/1) – 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>

Russ-Eft, D. & Preskill, H. (2009). Individual and focus group interviews. In *Evaluation in organizations: A systematic approach to enhancing learning, performance, and change* (2nd ed., pp. 313-343). Basic Books.

Week 7 – Optional

Gilmore, E. R. (2006). Using content analysis in human performance technology. In J. A. Pershing (Ed.), *Handbook of human performance technology* (3rd ed., pp. 819-836). Pfeiffer.

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 (3/2-3/8) – 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* (2nd ed., pp. 265-311). Basic Books.

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

Week 8 - Optional

Artino, A., La Rochelle, J. S., Dezee, K. J., & Gehlback, H. (2014). Developing questionnaires for educational research: AMEE Guide No. 87. *Medical Teacher*, 36, 463-474. <https://doi.org/10.3109/0142159X.2014.889814>

Dillman, D. A., Smyth, J. D., & Christian, L. M. (2009). *Internet, mail, and mixed-mode surveys: The tailed design method* (3rd ed.). John Wiley & Sons, Inc.

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

Week 9 (3/9-3/15) – Spring Break (no class)

Week 10 (3/16-3/22) - 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>

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 (1/12-1/18)	<ul style="list-style-type: none"> • Introduction • Orientation: 1/12 (Mon) at 7:00pm via Zoom 	Parker (2006); Rossett (2009)	<ul style="list-style-type: none"> • Introduce yourself (1/12) • Discussion 1 (Wed & Sat) • Team ground rules (1/18)
U2 (Basics)	2 (1/19-1/25)	Basics 1: NA Definitions Team Clinic 1	Russ-Eft & Sleezer (2020); Sleezer et al. (2014a, 2014b)	Discussion 2
	3 (1/26-2/1)	Basics 2: NA Dimensions	Altschuld (2004)	<ul style="list-style-type: none"> • Discussion 3 • Client selection (2/1)
	4 (2/2-2/8)	Ethical Issues Case 1	Sleezer et al. (2014); Stefaniak et al. (2015)	<ul style="list-style-type: none"> • Discussion 4 • One-page proposal (2/8)
	5 (2/9-2/15)	2024 AHRD Conference in Irving, TX (no class)		Permission letter (2/15)
U3 (Data Collection)	6 (2/16-2/22)	<ul style="list-style-type: none"> • Data Collection & Analysis • Case 2 • Team Clinic 2 	Aull et al. (2016); Sleezer et al. (2014)	<ul style="list-style-type: none"> • Discussion 6 • Data collection
	7 (2/23-3/1)	<ul style="list-style-type: none"> • Interviews • Case 3 	Mills & Stefaniak (2020); Russ-Eft & Preskill (2009)	<ul style="list-style-type: none"> • Discussion 7 • Data collection
	8 (3/2-3/8)	<ul style="list-style-type: none"> • Surveys • Case 4 	Russ-Eft & Preskill (2009); Swart (2021)	<ul style="list-style-type: none"> • Discussion 8 • Data collection • Mid-term peer evaluation (3/8)
	9 (3/9-3/15)			Spring Break (no class)
U4 (Data Analysis)	10 (3/16-3/22)	<ul style="list-style-type: none"> • SWOT Analysis • Case 5 	Cho & Brown (2013); Leigh (2010)	<ul style="list-style-type: none"> • Discussion 10 • Progress report (3/22)
	11 (3/23-3/29)	<ul style="list-style-type: none"> • Findings & Critical Success Factors • Draft Presentation: Guidelines 		SWOT Analysis (draft) (3/29)
	12 (3/30-4/5)			Team Clinic 3
	13 (4/6-4/12)			Draft report & presentation file (4/12)
U5 (Synthesis)	14 (4/13-4/19)	Draft Report Presentation (4/14) Final Report Submission to Client and Me (4/19)		<ul style="list-style-type: none"> • Ask for client feedback on findings & recommendations after draft presentation • Final report & transmission letter (4/19)
	15 (4/20-4/26)	Final Presentation to Client Reflection		<ul style="list-style-type: none"> • Client evaluation (4/24, Fri) • Final peer evaluation (4/26) • Reflection paper (4/26) • Course evaluation (online)

Appendix 1: Weekly Discussion Postings

Rubric

Evaluation Criteria	Rating			Points (10)
	Excellent (2)	Needs Work (1)	Unsatisfactory (0)	
Meet the 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	2
Follow the Recommended Logical Flow: Cite Required Readings and Answer the Question	Followed the recommended logical flow: Two required readings were cited, and the week's question was answered	Partially followed the recommended logical flow: Only one of the two required readings was cited, or the answer did not clearly answer the question	Did not follow the recommended logical flow: Required readings were not cited, or the answer did not answer the question	2
Answer the Week's Question within Three Sentences to Make it Compact and Pointed	The answer was written within three sentences to make it compact and pointed	The answer was written in slightly more than three sentences	The answer was long, not meeting the three-sentence requirement	2
Follow the APA Formatting Guidelines (7 th ed.)	Correctly followed the APA formatting guidelines	There were minor mistakes in following the APA guidelines	Did not correctly follow the APA formatting guidelines	2
Two Comments on Other Answers	Provided two comments on two answers	Provided only one comment	Provided no comment	2

Appendix 2: Team Ground Rules Sample

Team Ground Rules HRD 5308 – Needs Assessment (Spring 2025)

Team Name: Team PBM

Members: Brittany Rauch (Leader), Peggy Marie Salazar, and Phan Vu

Purpose: The purpose of this document is to outline the expectations of team members as we complete a needs assessment for a client organization. For the needs assessment, we will work with our client to identify a performance or learning gap, analyze the current state, and recommend areas for improvement.

Documents: Our team will collaborate and store documents in Google Drive and the suite of Google products. The team leader is responsible for converting the Google document into a Word document and submitting the official assignments and revisions to Dr. Cho via Canvas and for relaying feedback to the team.

Communication: Our team will communicate internally using GroupMe. Team meetings will be held weekly on Mondays at 5:45 pm via Zoom. If a team member is unable to attend, they will provide advanced notice of their absence (see below) and update the team on their assignments. The team leader will correspond with Dr. Cho via UT Tyler email for all questions and will cc: all team members to ensure visibility. Communication with the client will be via Marie using the client's preferred means.

Participation: All team members agree to the following:

- Actively participate in all coursework during the semester
- Respond to all teammate communications within 12 hours, but no later than 24 hours.
- Respect team members' time and work by being on time for meetings, communicating absences 24 hours in advance or as soon as possible, and completing work in a timely manner.
- Collaborate and provide support when requested
- Act professionally in alignment with all course and team ground rules
- Submit all assignments and project tasks on time per the agreed-upon schedule

If a team member fails to adhere to the agreements listed above, other team members should reach consensus to separate from the non-participating team member after being advised by Dr. Cho regarding the situation.

Consensus and Disagreements: In the event of conflict or disagreements, all team members should be respectful and professional to resolve issues. This includes but is not limited to active listening, assuming positive intent, asking for clarification and solutions based on what is best for the success of the team. If consensus cannot be reached, the team will resort to the majority rule; the team leader will get input from Dr. Cho if a tie needs to be broken.

Appendix 3: One-Page Proposal

Rubric

Criteria		Rating			Points
Key	Excellent (10)	Good (7)	Needs Improvement (5)	10	
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 (who is doing what).	One or two of the key elements is/are missing.	Two or more of the key elements are missing.		
Other	Excellent (3)	Good (2)	Needs Improvement (1)	10	
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 any idea about the project and how the team will conduct it. Needs much more detail to be thorough.	3	
Clarity	The proposal is pointed, clear, and free of typos and grammar mistakes).	The proposal is mostly pointed and clear and includes only a few typos and grammar mistakes.	The proposal is not pointed or not clear and includes several typos and grammar mistakes.	3	
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.	3	
Page Limit	The proposal is written on one page as required (1)	The proposal is written on more than one page, violating the assignment requirement (0)		1	

Appendix 4: One-Page Proposal Sample

A Needs Assessment on Customer Communication at UT Tyler's Passport Acceptance Facility

Purpose: The purpose of this needs assessment (NA) is to identify performance gaps in customer communication and appointment management at the University of Texas at Tyler (UT Tyler) Passport Acceptance Facility (PAF) and to provide actionable strategies to address those gaps.

Rationale: Occupying the unique position of a public service facility within a higher education setting, the PAF serves as a valuable resource for UT Tyler students, staff, and faculty, as well as the broader East Texas community by providing highly rated, customer-focused services to passport applicants. However, the office efficiency has struggled to keep pace with its growing clientele, particularly in areas such as appointment scheduling, preliminary communication with applicants, and physical signage at the facility. In this NA, we will assist our client in identifying performance gaps in customer communication and appointment management to provide targeted, data-driven suggestions for optimizing workflow and applicant experience.

Key Stakeholders: Jessica Chandarlis (PAF Manager), five PAF staff members (including three student workers), and 20 passport applicants

Frame Factors: Internal factors include maintaining the scope of the project, accommodating time constraints, and avoiding unequal workloads. External factors include obtaining sufficient survey responses from applicants and accessing stakeholders when needed.

Data Collection and Analysis:

- Literature review on customer communication and appointment management in higher education
- Benchmarking of passport services at peer universities
- Document review of current operational procedures, appointment logs, and customer feedback
- One-on-one semi-structured interviews with facility manager and two full-time staff members
- Email interviews with three part-time student staff
- Survey with 20 current passport applicants
- Content analysis of the one-on-one and the focus group interview data
- Descriptive statistical analysis of the survey data
- SWOT analysis as the final step of data analysis

Project Milestones and Division of Labor:

Project Milestone	Due Date	Lead
Initial Client Meeting	2/4	Team LAMA
One-Page Proposal	2/9	Megan
Permission Letter	2/16	Lauren
Data Collection:		
1) Literature Review	2/17	Megan
2) Benchmarking peer facilities	2/19	Audrey
3) Document Review	2/21	Lauren
4) Interviews: One-on-one and email interview	2/24	Audrey
5) Survey	2/28	Andrea
Data Analysis:		
1) Content analysis of the interview data	3/12	Audrey
2) Descriptive statistical analysis of the survey data	3/16	Andrea
3) SWOT Analysis (draft)	3/30	Team LAMA
Progress Report	3/16	Megan & Lauren
Draft Report and a ppt file	4/13	Andrea & Megan
Draft Presentation	4/15	Team LAMA
Solicit client feedback on findings and recommendations	Week of 4/14	Audrey
Final Report Submission to Client and Dr. Cho	4/20	Audrey
Final Presentation	Week of 4/21	Team LAMA

Appendix 5: Permission Letter Sample



February 10, 2024

Team JJS HITZ
University of Texas at Tyler
3900 University Blvd.
Tyler, TX 75799

Dear Team JJS HITZ,

I am writing to request a needs assessment for Becoming Us Collective, LLC. We are a consulting firm that provides training on Equity and Inclusion to school districts in California. Our training assists school districts that have been identified by the federal government as having Significant Disproportionality within IDEA regulations. Currently, our clients are funded by the Comprehensive Coordinated Early Intervening Services (CCEIS).

Due to positive results from previous school districts, we have rapidly grown in assignments and clients. However, we are struggling with our onboarding process. We don't have a well-written informative onboarding guide for future employees.

Becoming Us Collective, LLC is seeking well-structured written materials to present to our new employees. Enhancing our onboarding process is crucial to instill confidence in our clients that we can effectively deliver the services they are seeking. We are eager to collaborate with you in refining and improving these processes.

I give Team JJS HITZ permission to use our company name in your report. Please deliver your report to me by April 21, 2024. We are excited to work with you on this project. Don't hesitate to contact me when I can help with the process.

Sincerely,

A handwritten signature in black ink that reads "Elizabeth Claes".

Elizabeth Claes
CEO
1893 Carleton Drive
Turlock, CA
elizabeth@uscollective.net
209.585.8393

Appendix 6: Needs Assessment Report Rubric

Criteria	Rating			Points (30)
	Excellent (15)	Good (13)	Needs Improvement (10)	
Required Elements of the Report - Does the report include all required elements of the report?	The report includes all required elements: the title page, executive summary, acknowledgements, table of contents, introduction, frame factors, project methodology (process figure, literature review, and at least two data collection methods), SWOT Analysis, findings, and 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	
Design	Excellent (3)	Good (2)	Needs Improvement (1)	15
Organization - Is the report well-organized?	The report is well-organized and demonstrates an understanding of the data obtained from all sources	The report is adequately organized and demonstrates an understanding of the data obtained from all sources	The report is somewhat organized and does not demonstrate an understanding of the data obtained from all sources	3
Clarity - Is the report written in ways that your client can easily understand?	The report is well-written, clear, and free from grammar and spelling errors	The report shows above average quality and clarity in writing. There are minor errors in grammar and spelling	The report shows average quality of writing. There are some errors in grammar and spelling	3
Consistency – Does the report show consistency?	The report shows consistency in information and design presentation	The report largely shows consistency in information and design presentation	The report somewhat shows consistency in information and design presentation.	3
Professional Outlook – Is the report developed in a professional manner?	The report is developed in a very professional manner to effectively communicate content with the balancing act of text and visuals	The report is appropriately developed in a professional manner to communicate content with the balancing act of text and visuals	The report is developed in a limited professional way to communicate content with the balancing act of text and visuals	3
Attention to Detail - Does the report follow the APA (7th ed.) formatting guidelines?	The report correctly follows the APA guidelines and demonstrates students' ability to pay attention to detail	The report somewhat follows APA guidelines and somewhat demonstrates students' ability to pay attention to detail	The report follows the APA guidelines in a limited way and does not show students' ability to pay attention to detail	3

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 TORK 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.

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)

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

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

Please use this space for any additional comments.

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

Signature: _____ Date: _____