HRD 5308-701 Needs Assessment in HRD (50942)
Summer 2025

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

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Instructor:	Dr. Yonjoo Cho (ycho@uttyler.edu), Professor
Class Time:	5/5 – 6/22 (UFHRD Conference: 6/11-13)
Orientation:	5/5 (Mon) at 7:00pm CT via Zoom
Office Hours for Individual/Team Clinic:	Mondays at 7:00pm to 8:30pm – Reserve a 15-/30-min slot on a Google Doc at the week's Read Me First page
Draft Proposal Presentation:	Week 7 (6/16) at 7:00pm CT via Zoom
Communication:	Canvas, emails, Zoom, and Telephone (903-566-7260)
Course Access:	https://uttyler.instructure.com/courses/47690
Zoom:	https://uttyler.zoom.us/my/yjcho

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COURSE DESCRIPTION

This course centers on concepts, cases, and practices of needs assessment in HRD. The identification of needs is a starting point for performance improvement in organizations. The process of conducting needs assessment has a greater impact on performance improvement by attending to the context in the organization. Based on the basics of needs assessment learned in class and information collected from their client, student teams will write a proposal to show their understanding of needs assessment that will be applied to a client organization.

COURSE OBJECTIVES

The objectives of the course include the following:

- To understand concepts, principles, and cases of needs assessment in diverse organizations
- To learn how to use data collection and analysis methods and SWOT Analysis as the final step of data analysis in the needs assessment process
- To write a needs assessment proposal on performance needs in a client organization
- To learn the balancing act of individual and teamwork activities to fully grasp the gist of needs assessment in HRD

CORE COMPETENCIES

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

- Learn the basics of needs assessment by reading required readings, discussing cases, and writing a needs assessment proposal in teams.
- Learn data collection methods (e.g., interviews, surveys) and SWOT Analysis as the final step of data analysis.
- Write a needs assessment proposal on performance needs of a client organization:
  - Select a project topic and client
  - Gather information from the client

o Write a needs assessment proposal including key elements: project title, purpose, context, key stakeholders, frame factors, data collection and analysis including SWOT Analysis, and project milestones
- Develop communication skills from working with team members, the instructor, and client, to become a needs analyst or needs assessor.
- Reflect on the lessons learned from individual, teamwork, and class participation activities.

COURSE OUTLINE

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

Figure 1
The Needs Assessment Process
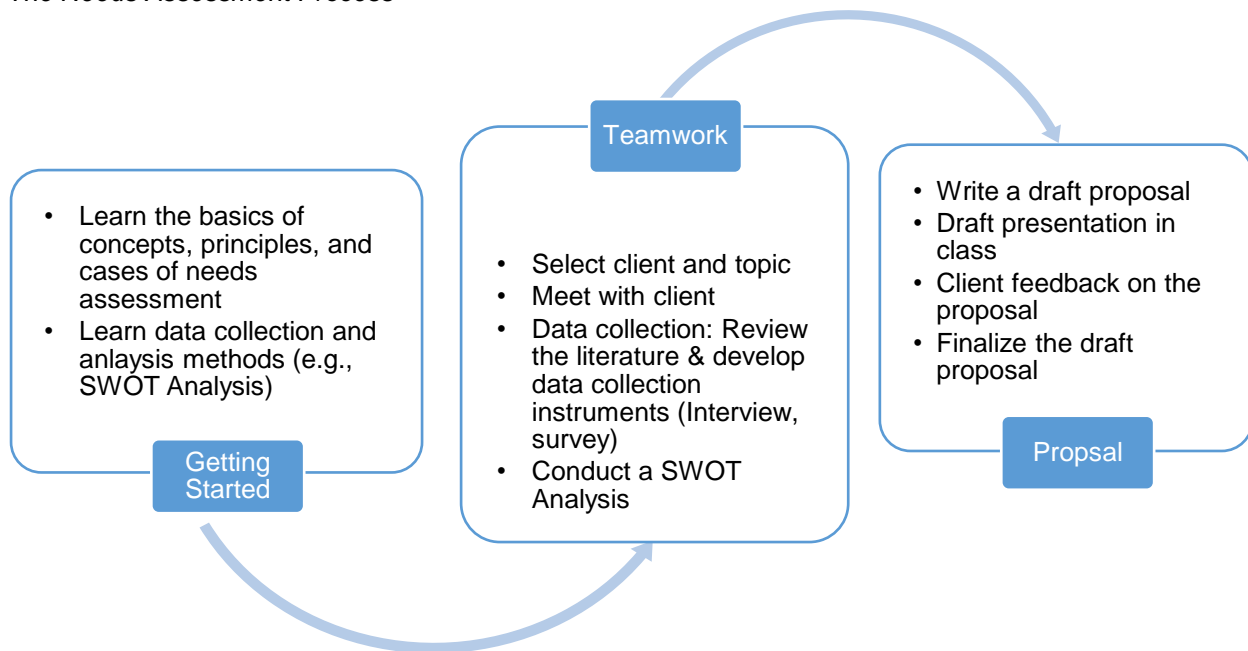
This course consists of four units: introduction, basics, data collection and data analysis (SWOT Analysis as the final step), and synthesis (draft proposal presentation and reflection).

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

Unit 2: Basics
Develop a common understanding of the dimensions underlying needs assessment in HRD.

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

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

Unit 4: Synthesis – Draft Proposal Presentation and Reflection
Present a draft proposal in class:

- Present a draft proposal to class to gather feedback from classmates and me.
- Solicit client feedback on the draft proposal
- Finalize the draft proposal

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

READ ME FIRST (Canvas Modules)

This is the place where you begin each week by reading a Read Me First (Canvas Modules) that will guide you to things to do in the following week, and it will be posted by Saturday at 9:00am CT.

SYNCHRONOUS MEETINGS

Research on online teaching and learning indicates that students need synchronous meetings to feel *presence* in online classes and to set the same expectations. To that end, we will have Zoom meetings:

- Orientation in Week 1 (5/5) at 7:00pm CT
- Office hours on Mondays at 7:00pm to 8:30pm CT
- Team clinic in Week 6 (6/9)
- Draft proposal presentation in Week 7 (6/16) to receive feedback from other students and me.

All Zoom meetings are optional, except draft proposal presentation. All synchronous meeting listed will be recorded and shared after the meetings are over.

INDIVIDUAL AND TEAM WORK

This course consists of individual work (39%) and team project-based learning (61%) as many business courses are, so students work in teams as well as individually. For teamwork:

- I randomly assign you to a team of three students to ease your burden of forming teams.
- 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 team members' teamwork, I will ask you to fill out a peer evaluation form (see Appendix 4) at the end of the semester. 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 in the needs assessment process, particularly when choosing a project topic, providing contextual information, developing an interview protocol and a survey questionnaire, and applying a SWOT Analysis as the final step of data analysis. If you cannot find a client organization, choosing a team member's employer may be an alternative.

FEEDBACK-BASED

Research shows that team-based project learning is not possible without the instructor's timely feedback; therefore, I am going to provide quick and detailed feedback for you to move forward as planned. In the process, you will learn how to meet assignment requirements, develop critical thinking skills, and improve writing as a graduate student, using the **APA writing style** as required in HRD and in the College of Business at UT Tyler. If you need help, use my office hours (Tuesdays, 7:00pm to 8:30pm) and sign up for an individual clinic for a 15- or 30-minute slot on a **Google Doc** that is added at the end of the week's Read Me First page.

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 your learning goals and completing all assignments and class activities within the due dates. In each step of the process, I am going to be there to provide you with prompt and detailed feedback. If assignment guidelines and my feedback are unclear, ask for clarification. To achieve your learning goals, be willing to learn required competencies as a graduate student including writing a needs assessment proposal, the use of SWOT Analysis as the final step of data analysis, and the APA writing style. The 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 are due by **Sundays at 11:59 pm CT,** except weekly postings and introduction:

Assignment		Level	Point (%)	Due
Weekly Discussion Postings (10 pts x 5 weeks)		Ind	50 (18)	Weeks 1, 2, 3, 4, & 5: 1 Answer by Wed & 2 Comments by Sat
Needs Assessment Project (12 Steps)	1. Team formation by the instructor	Team	170 (61)	5/5
	2. Team ground rules (10)			5/11
	3. Client and topic selection based on client meeting (20)			5/18
	4&5. Literature review (10) & Interview protocol (10)			5/25
	6. Survey questionnaire (20)			6/1
	7. SWOT Analysis (20)			6/8
	8. Team Clinic			Week 6
	9. Draft proposal (30) and ppt file			6/15
	10. Draft proposal presentation (20)			6/16 at 7:00pm
	11. Client feedback on draft proposal			Week of 6/16
	12. Final proposal (30) including client feedback			6/22
Class Participation Activities	Introduce Yourself (10)	Ind	40 (14)	5/7 (Wed)
	Discussion lead (20)			
	Team contributions: Peer-evaluation (10)			6/22
Reflection Paper		Ind	20 (7)	6/22
Total			280 (100)	

WEEKLY DISCUSSION POSTINGS (50 pts)

You will develop an understanding of concepts, principles, and cases of needs assessment through reading one to three required readings until Week 5. Each week, I will post a discussion question on Canvas Discussion, and a discussion leader will lead the week's discussion.

Post one compact and pointed answer <mark>within three sentences</mark> by the end of **Wednesday** and two comments on other students' answers by the end of **Saturday,** following the APA formatting guidelines. I will provide feedback on your postings if you did not meet the posting requirements on **Thursday** so that you may revise your answer by Saturday. This assignment is worth **10 points** each week: **8 points for an answer and 2 (1x2) points for two comments**. In commenting, don't just say "yes" or "no" and add the reasons why you say "yes" or "no" to receive one point for each comment. See the following, compact and pointed sample answer:

Discussion question: Based on the two readings, how do you define needs assessment in your own words?
Sample answer: Russ-Eft and Sleezer (2020) highlighted that needs assessments must often be performed strategically to ensure balance between meeting the standards of systemic research and providing practical results within the context of time, resources, and stakeholder expectations. Sleezer et al. (2014) defined a need as a gap in learning or performance that exists between the current condition and the desired condition. Based on the two readings, I would define needs assessment as a strategic process used to identify and close learning or performance gaps to achieve desired outcomes (Anya, 2025).

A discussion leader will lead the week's discussion. Choose a week to play a discussion lead role and write down your choice on a **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 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, you must be present throughout the week of your choice, for a minimum of three days, and post approximately 10 postings including feedback and questions.

In the process of weekly discussions, students will better understand concepts and principles regarding needs assessment and develop critical thinking skills. 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 to save space (see **Appendix 1 for the postings rubric**).

NEEDS ASSESSMENT PROJECT (170 pts)

The purpose of this final project is to write a proposal in which student teams show how to work through a needs assessment process that will be applied to a client organization. To that end, follow the steps:

- Form a team of three students, name your team, and set up the team ground rules (see **Appendix 2 for the team ground rules sample**).
- Select a client who is interested in working with you for your needs assessment. Your client can be a profit or non-profit organization, university unit, school, small startup company, or the military. You may choose a team member's employer as client.
- In a meeting with your client, select a project topic and to gather information about performance needs in the organization.
- After learning the basics of needs assessment, write **a single-spaced, ten-page proposal** including proposal, references, and appendices as follows:

  1. The cover page includes a project title, the course title, submission date, and team member names.
  2. The second page begins with an overview of the proposal

3. Purpose: Clearly state the project purpose in a one sentence
4. Context: Add information about the context (background) of your client organization
5. Key stakeholders: List key stakeholeders with whom the team will collect data
6. Frame factors limit the scope of the needs assessment project including internal factors (e.g., busy schedule) that concern the student team and external factors (e.g., client availability) that concerns your client.
7. Data collection (literature review and interview protocol and/or survey): Explain how you will collect data beginning from a literature review on the topic and including interviews (e.g., interview protocol) and surveys (e.g., survey questionnaire)
8. SWOT Analysis for the final step of data analysis
9. <mark>Client feedback: Solicit client feedabck after the draft proposal presentation and add the feedback received in the final proposal</mark>
10. Appendices: Appendix 1: Interview Protocol, Appendix 2: Survey Questionnaire, Appendix 3: SWOT Analysis, and more
11. References provide evidence that you reviewed the literature on the project topic.

In **a draft proposal presentation in Week 6**, teams report on their draft proposal via Zoom and receive feedback from me and classmates. This is helpful for teams to finalize their draft proposal and to see how other teams are doing as well. After the draft presentation is over, teams should solicit their client's feedback on the draft proposal and add their feedback in the final proposal.

Your needs assessment proposal will be evaluated for criteria including: (a) all key elements including **client feedback**, (b) being thorough, (c) clarity, (d) APA formatting guidelines, and (e) page limit (see **Appendix 3 for proposal rubric**)

CLASS PARTICIPATION ACTIVITIES (40 pts)

Actively participate in class activities: (a) your introduction, (b) discussion lead, and (c) peer evaluation at the final (see **Appendix 4 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 project learning. To that end, include: (a) a title, purpose, and introduction, (b) key points of lessons learned, and (c) suggestions/conclusions. In this paper, title the reflection paper to aptly sum up your learning experience in a nutshell.

GRADING GUIDELINES

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

COURSE POLICIES

<mark>Artificial Intelligence (AI) Use</mark>
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 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, writing a proposal, data collection and analysis, and SWOT Analysis are posted on 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)[1] in all writing assignments, as it is required in the UT Tyler HRD MS and College of Business. Take a look at a mini lecture on the basics of APA on Canvas Files and see how I referenced publications in this syllabus. You will learn how to write well in a compact and pointed way at the end, as APA is not just about editing but also about organizing ideas.

HRD Journals: Five representative HRD journals (below) will be resourceful for the review of the literature:

- *Advances in Developing Human Resource Development* (*ADHR*)
- *European Journal of Training and Development* (*EJTD*)
- *Human Resource Development International* (*HRDI*)
- *Human Resource Development Quarterly* (*HRDQ*)
- *Human Resource Development Review* (*HRDR*)

The 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. Each of the 60 to 90-minute episodes focuses on a different aspect of HRD and includes a one-on-one discussion with each guest, as well as a group discussion where all the guests are together to discuss their shared interest in the episode topic. This is an outstanding resource to understand the most current topics and foundations of HRD.

TEXTBOOKS: <mark>No textbook is required</mark>.

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.

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

NEEDS ASSESSMENT CASES

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 3]**

Mills, E., & Stefaniak, J. (2020). A needs assessment to align perspectives for the career needs of international students. *Performance Improvement*, *59*(9), 6-14. https://doi.org/10.1002/pfi.21936 **[Case 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 2]**

REQUIRED READINGS

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

Week 1 (5/5-5/11) – What is Needs Assessment?

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.) (2014). Chapters 1 and 2. In *A practical guide to needs assessment* (3rd ed., pp. 15-49). Wiley.

Week 1 – Optional

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

Ruff-Eft, D. F., & Sleezer, C. M. (2020). Lessons learned. In D. F. Russ-Eft & C. M. Sleezer (Eds.), *Case studies in needs assessment* (pp. 280-288). SAGE.

Week 2 (5/12-5/18) – Dimensions of Needs Assessment

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

Week 3 (5/19-5/25) – Data Collection and Analysis, Interviews, & Case 1

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.

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

Week 3 – 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.

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.

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 4 (5/26-6/1) – Surveys & Case 2

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 4 - 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 5 (6/2–6/8) – SWOT Analysis & Case 3

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 5 - 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 (5/5-5/11)	• What is Needs Assessment? • Effective teamwork • Orientation: 5/5 (Mon) at 7:00pm via Zoom	Rossett (2009); Sleezer et al. (2014)	• Introduce yourself (5/7) • Discussion lead (5/7) • Team formation by me (5/5) & team ground rules (5/11) • Discussion 1 (Wed & Sat)
U2 (Basics)	2 (5/12-5/18)	Dimensions of Needs Assessment	Altschuld (2004)	• Discussion 2 • Topic & client selection (5/18)
U3 (Data Collection & Analysis)	3 (5/19-5/25)	• Data Collection and Analysis, Interviews, & Case 1 • Literature Review	Mills & Stefaniak (2020); Russ-Eft & Preskill (2009); Sleezer et al. (2014)	• Discussion 3 • Literature review & Interview protocol (5/25)
	4 (5/26-6/1)	Surveys & Case 2	Russ-Eft & Preskill (2009); Swart (2021)	• Discussion 4 • survey questionnaire (6/1)
	5 (6/2-6/8)	SWOT Analysis & Case 3	Cho & Brown (2013); Leigh (2010)	• Discussion 5 • SWOT Analysis (6/8)
U4 (Synthesis)	6 (6/9-6/15)	Team Clinic (6/9) (Cho's presentation at the 2025 UFHRD Conference, Belfast, Northern Ireland)		Draft proposal and presentation file (6/15)
	7 (6/16-6/22)	Draft Proposal Presentation: 6/16 (Mon) at 7:00pm via Zoom		• Final proposal (6/22) • Peer evaluation (6/22) • Reflection paper (6/22) • Course evaluation

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 reading 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 (7th 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

HRD 5308 – Needs Assessment   Needs Avengers (Abigail, Cali, Sydnee, & Craig)

Team Ground Rules

HRD 5308

Spring 2024

Team Name: Needs Avengers

Members: Abigail Brewer, Cali Davis, Sydnee Mullins, and Craig Ward

Team Lead: Sydnee Mullins

Purpose: The purpose of this ground rules is to set the same expectation to collaboratively undertake a needs assessment with the aim of identifying a performance gap in an organization. Upon identifying the gap, our team will engage with the client to propose a solution designed to enhance the areas that have been identified. We will abide by our ground rules to produce evidence-based findings and recommendations for the client organization.

Documents: We will employ Microsoft Word documents for generating, storing, and collaboratively working on content relevant to the team project. For daily communication, a group iMessage will serve as our primary platform (see below for further elaboration). Our team leader, Sydnee Mullins, will be the final checker and oversee submitting all assignments on behalf of the team. Additionally, Sydnee will communicate with Dr. Cho and share her suggested revision requests with members within the specified assignment deadlines.

Communication: The team will use group text and email to communicate. Zoom meetings will be held weekly on Tuesdays at 8:00 pm CT. If a team member is unable to attend, they should notify the team through group text at least 24 hours prior to the meeting. When communicating with Dr. Cho, the team leader will use her UT Tyler email and relay information to all other members.

Participation: Team members are required to actively participate, demonstrate flexibility, and respect others' time. In instances where a team member encounters challenges with a specific segment of the assignment, they are expected to seek assistance from fellow team members. Collaboration is encouraged, and all team members should collectively support one another. In team meetings, all members should come prepared to discuss upcoming assignments and actively seek feedback from their peers.

Disagreement/Conflict Resolution: In the event of conflicts or disagreements, it is imperative for all team members to maintain a respectful demeanor. Seeking clarification from one another is encouraged to prevent misunderstandings. Every team member is given the opportunity to express concerns and thoroughly communicate their thoughts. We will make decisions through team consensus, prioritizing the best interests of the team. If a consensus proves elusive, the team will defer to the majority rule. Should the need arise, seeking guidance from Dr. Cho is permissible; however, contacting her via email should only be considered after exhausting all other available options.

Appendix 3: Proposal Rubric

Criteria	Rating			Point (30)
Content	**Excellent (15)**	**Good (13)**	**Needs Improvement (10)**	**15**
Key Elements	All key elements of the proposal are included: title, overview, purpose (one sentence), context (background), key stakeholders, frame factors, data collection (literature review, interview protocol, and/or surveys), SWOT Analysis, client feedback on the proposal, appendices, and references	One or two of the key elements is/are missing	More than three of the key elements are missing	
Design	**Excellent (3)**	**Good (2)**	**Needs Improvement (1)**	**15**
Organization	The proposal is well-organized within single-spaced 10 pages and demonstrates an understanding of the data obtained from all sources	The proposal is adequately organized within single-spaced 10 pages and somewhat demonstrates an understanding of the data obtained from all sources	The proposal is not organized within the single-spaced page limit and does not demonstrate an understanding of the data obtained from all sources	3
Clarity	The proposal is well-written, clear, and free from grammar and spelling errors	The proposal shows above average quality and clarity in writing. There are minor errors in grammar and spelling	The proposal shows average quality of writing. There are some errors in grammar and spelling	3
Consistency	The proposal shows consistency in information and design presentation	The proposal largely shows consistency in information and design presentation	The proposal somewhat shows consistency in information and design presentation.	3
Professional Outlook	The proposal is developed in a professional manner to effectively communicate content with the balancing act of text and visuals	The proposal is appropriately developed in a professional manner to communicate content with the balancing act of text and visuals	The proposal is developed in a limited professional way to communicate content with the balancing act of text and visuals	3
Attention to Detail	The proposal correctly follows the APA guidelines and demonstrates students' ability to pay attention to detail	The proposal somewhat follows APA guidelines and somewhat demonstrates students' ability to pay attention to detail	The proposal follows the APA guidelines in a limited way and does not sufficiently show students' ability to pay attention to detail	3

Appendix 4: Peer Evaluation Form

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

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

Preparation Prepared for team meetings; has read course material and understands the issues and subject matter; completes team assignments on time; attends and is on time to team meetings				
Participation & Communication Articulates ideas effectively when speaking or writing; submits papers without grammatical errors; listens to others; encourages others to talk; persuasive when appropriate				
Helps Group Excel Expresses great interest in group success by evaluating ideas and suggestions; initiates problem solving; influences and encourages others to set high standards; doesn't accept just any idea but looks for the best ideas; stays motivated from beginning to end of projects				
Team Player (Cooperation) Knows when to be a leader and a follower; keeps an open mind; compromises when appropriate; can take criticism; respects others				
Member Name	**Team Player**	**Helps Group Excel**	**Participation & Communication**	**Preparation**
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
(yourself)	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely

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

Please use this space for any additional comments.

_____

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

Signature: _____ Date: _____