



TRAINING AND DEVELOPMENT
OUTLINE AND SYLLABUS

SHRMTM

SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

Needs Assessment

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Note to HR faculty and instructors: SHRM cases and modules are intended for use in HR classrooms at universities. Teaching notes are included with each. *While our current intent is to make the materials available without charge, we reserve the right to impose charges should we deem it necessary to support the program.* However, currently, these resources are available free of charge to all. Please duplicate *only* the number of copies needed, one for each student in the class.

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Needs Assessment

TOPIC AND BASIC DESCRIPTION: NEEDS ASSESSMENT

This learning module describes the steps to conduct a needs assessment as part of a training design process. The content is most appropriate for the undergraduate level but could also be used in an introductory graduate training course.

At the completion of this module, learners will be able to discuss the role of needs assessment in the training design process, describe the steps to conduct a needs assessment and develop a plan to assess needs of a performance issue.

The module is 150 minutes in length and can be taught over three, 50-minute periods (noted below), two 75-minute periods or one three-hour period. Specific learning outcomes are outlined for each module below.

Lesson 1 (50 minutes):

- Describe the role of a training needs assessment to address performance issues.
- Discuss the reasons to complete a training needs assessment.

Lesson 2 (50 minutes):

- Describe the three steps to conduct a training needs assessment; organization analysis, person/learner analysis, and task/work analysis.
- Describe the methods and sources available to collect needs assessment data.

Lesson 3 (50 minutes):

- Design a needs assessment plan based on a performance issue.

Activities

Introductory and review activities are included with each module to link the lesson discussions and support knowledge transfer of the content.

Specific application activities are also included with each module; a comprehension quiz (Lesson 1), a case study completion and discussion (Lesson 2), and a needs assessment plan (Lesson 3). Each activity is described below.

- Lesson 1: *Test Your Knowledge of Needs Assessment*. Learners will complete a 10-question quiz to test their knowledge of the learning objectives for this lesson. Quiz items are taken directly from the content covered in the class.
- Lesson 2: *Mini-Case Study: Needs Assessment*. Students will review a mini-case study that describes a needs assessment process. Students will identify the steps of the needs assessment process and assess whether the steps and methods were used appropriately and effectively.
- Lesson 3: *Proposing a Needs Assessment Plan*. Using a current performance issue in their organization, learners will create a needs assessment plan that describes the specific assessment process and the methods used to collect the necessary data.

Suggested Reading(s)

Most of the content for these lessons is derived from the authors' teaching and training experiences. However, the following references were consulted to confirm content validity and relevancy for the module. The list below also includes sources that are readable and accessible to assign for student reading.

Burke, L.A. (Ed.). (2001). *High impact training solutions*. Quorum Books, Westport, CT.

Brown, J. (2002). Training needs assessment. *Public Personnel Management*, 31(4), 569-578.

Einstein, M. (2005). Test, then train. *T+D*, 59(5), 26-28.

Noe, R. (2008). Needs assessment. In R. Noe's (4th ed.) *Employee Training and Development*. New York, NY: McGraw-Hill/Irwin.

Zemke, R. (1998). How to do a needs assessment when you think you do not have time. *Training*, 35(3), 38-44.

Note: We use the Noe textbook in our introductory training classes, and the chapter on needs assessment is informative with additional examples and content.

PowerPoint Slides

There are 30 PowerPoint slides covering the three lessons of the module. Teaching notes, questions and options for presenting content are included.

Reflections and Suggestions by the Authors

Students may be unfamiliar with the needs assessment step in the training design process. It is an often overlooked and undervalued step to ascertain a performance issue. Students will likely have many questions about how and why to complete a needs assessment, so ample time should be provided to explore the rationale behind completing a needs assessment and how it can contribute to the development of a performance improvement plan.

Although we present the needs assessment steps (organization, task, learner) in order, the only step that is typically fixed is that of the organization analysis, which should be conducted as the first step. Task and learner analysis can be completed in

any order and sometimes in tandem but always after the organization analysis. This is because if there is no supervisory support or organizational resources to develop the training (should it be needed), then task and person analyses are pointless.

There are a few examples included in the slides to help students become familiar with the idea of needs assessments. Instructors may ask students for examples from their own experience of when a needs assessment would have been helpful to diagnose a performance issue or when a needs assessment was improperly used. A helpful analogy to describe the value of a needs assessment is that it is like being given medicine for an ailment without being asked about the symptoms or problem. Such guesswork will likely lead to misappropriation of time and resources (or medicine!) and may never solve the performance issue.

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