UNIVERSITY OF LOUISVILLE®

Organizational Leadership and Learning Program
Department of Leadership, Foundations, and Human Resource Education
College of Education and Human Development

Course Syllabus   ELFH 662 Organizational Analysis (Spring 2016)

Instructor   Denise M. Cumberland, Ph.D.
Office: Porter Education Building
Office hours: Tuesdays 1:30 – 3:30 pm and Thursdays 1:30 – 3:30 pm CEHD Room
338B

I will also work with you in arranging an appointment, if this time is not feasible.
Cell Phone: 502-609-3504
E-mail: denise.cumberland@louisville.edu
Please note that underline email is the quickest way to get in touch with me. Unless otherwise noted, I will respond within 48 hours during the work week.

Meeting Time: Tuesdays from 7:00-8:30 pm via Collaborate. Information on collaborate can be found at:
http://www.blackboard.com/Platforms/Collaborate/Services/On-Demand-Learning-Center/Web-Conferencing.aspx

We have a mandatory collaborate session on Tuesday, 1/12 from 6:30 – 7:00 pm. In addition to ensuring your microphone works on Collaborate, during this time we will go over the expectations of the course (this is a valuable chance to learn what is expected). Regular class begins at 7:00 pm.

Websites   Blackboard: https://blackboard.louisville.edu
OLL Program: http://uofl.me/OLLProgram

Catalog Description, Including Prerequisites
Examination of the process and techniques used to conduct an organizational analysis in order to identify societal, organizational, departmental and individual performance needs.   Prerequisites: none

Course Purpose
The purpose of this graduate level course is to provide learners with the knowledge and skills necessary to plan for an organizational diagnosis in order to identify and report societal, organizational, departmental, and individual performance needs. This course is designed to build introductory theoretical as well as practical knowledge and skills in needs assessment and performance analysis in private and public organizations.

Required Readings, Texts
Altschuld, J.W. (2010). *Needs assessments Kit (5 volumes)*. Thousand Oaks, CA: Sage. ISBN: 9780761925958
Other required readings are online or will be placed on electronic reserve (available on Blackboard).

Student Learning Outcomes
This course primarily contributes toward developing the "Investigate Gap" competencies of our HROD Program:

1.1 Identify the environment and culture of the workgroup.
1.2 Analyze and interpret critical business issues and challenges.
1.3 Utilize evidence-based literature to guide inquiry.
1.4 Utilize appropriate inquiry methods.
1.5 Assess needs and opportunities.
1.6 Identify causal factors that limit performance.
1.7 Interpret results and make recommendations.

Course Objectives
At the conclusion of this course, participants should be able to:
1. Demonstrate a "systems-thinking" approach to organizational and person diagnosis.
2. Explain the relationship between strategic thinking, performance improvement, and organizational analysis.
3. Describe the theoretical foundations underlying organizational analysis.
4. Identify ethical issues of organizational diagnosis.
5. Troubleshoot human performance gaps in organizations.
6. Identify trends affecting performance gaps.
7. Develop plans to guide analysis
8. Choose appropriate methods for conducting an analysis
9. Construct data collection instruments.
10. Analyze data in order to make performance improvement/programmatic recommendations.
11. Build new knowledge from vast amounts of information available.
12. Present needs assessment findings and recommendations in written and oral form.

CEHD Conceptual Framework Summary
The college's conceptual framework, *Shaping Tomorrow: Ideas to Action*, embodies a unified rationale for our diverse programs that includes three constructs: Inquiry, Action, and Advocacy. Under the construct of *Inquiry*, and through active engagement and skilled training in methods of rigorous *Research*, candidates develop the knowledge, skills, and dispositions to become *Critical Thinkers*. Scholarship, informed practice through inquiry and reflection, is performed not in isolation but in communion with others, both within the university and in the world (Shulman, 2004). Under the construct of *Action*, and through continual *Practice*, candidates develop the knowledge, skills, and dispositions to become *Problem Solvers* in the community. They are encouraged to apply knowledge and change practice to solve real world problems. Under the construct of *Advocacy*, and through dedicated, committed *Service* to their peers, university, community, and world, candidates develop the knowledge, skills, and dispositions to become *Professional Leaders*. Our candidates are empowered to participate fully in the life of the metropolitan community in which we live, to practice social justice, and to seek equity of educational access for all the constituents.

Conceptual Framework Constructs	Inquiry	Action	Advocacy
Constructs as Learned and Applied	Research	Practice	Service
Constructs Reflected in	Critical Thinkers	Problem Solvers	Professional Leaders

Candidates			
Unit Dispositions Reflected in Candidates	Exhibits a disposition to inform practice through inquiry and reflection	Exhibits a disposition to improve practice through information, knowledge, and understanding	Exhibits a disposition to affirm principles of social justice and equity and a commitment to making a difference

Relationship to Conceptual Framework

ELFH 662 contributes to *Inquiry* by developing student skills in organizational analysis methodologies, which include data collection and analysis. Students are required to be *Critical Thinkers* as they use data collection and analysis skills to select and recommend interventions. The course has an *Action* component because it contributes to *Practice* by allowing students to serve as problem solvers through the organizational analysis project.

Outline of Course Content
- Introduction
  - Foundations of Organizational Analysis
  - Views of Organizations
  - Systems Thinking
  - Organizational Analysis Ethics
- Planning for Needs Assessment and Performance Analysis
- Data Collection Techniques
- Data Analysis
- Organizational Culture and Politics
- Post-assessment, Action, and Presenting Findings
- Linking Analysis to Strategic HR

Specific Requirements:	Competency/ Objective
Organizational Analysis Project (Hallmark Assessment) This project provides you with the opportunity to apply the information, knowledge, and skills you learn in this class to a real organization. You will develop and complete a needs assessment or performance analysis in an organization of your choice. This is a project that enables you to receive feedback along the way. Part 1 and Part 2 are submitted for feedback and grading. You will be expected to make the revisions and submit as part of the final paper work product. Each of these sections is read again as part of the final work product and the improvements help your overall score. Project deliverables include:	Competencies 1,1, 1.2, 1.3, 1.4, 1.5, 1.6, 1.7
- Part 1: Pre-assessment and Planning Section: 3-4 pages (Must include work plan) - Part 2: Part 1 Revised AND you must include the Data Collection Plan, your Sample with rationale, and your data collection instruments - Final HAT: Approximately 10-12 pages (includes revisions to Part 1 and Part 2) *See "Hallmark Assessment Task" for more details.* NOTE: Use template provided on Bb and Spacing of 1.15 *Team Option: This project can be conducted in teams of 2-3 individuals. Teams must be formed by 9am on January 19, 2016. If conducting a team project, a detailed project management plan must be included as an appendix in Part 1 to show how work will be distributed among team members.*	Course Objectives 1, 3, 5, 6, 7, 8, 9, 10, 11
Option: Below are two options to help guide your learning. Select the one that makes the most sense for your situation or your preferred learning style. **Option 1: Practice Organizational Development (POD) Sites** My goal with the POD Sites is to provide you with small group interactions where you can help one another navigate the NA. **There are 4 POD assignments.** For each POD assignment you will need to set aside :30 minutes to make your initial post and :30 - :45 minutes to offer feedback to your POD mates over the window of time the POD is open. You are graded individually – based on how well you participated in the POD Site and your ability to share helpful insights with your POD mates. Helpful insights means more than "looks good." You need to use your book to offer suggestions and provide specific suggestions for how to help your POD mate improve their work. There are two due dates for each POD Assignment. See **Appendix A** for the POD due dates. The minimum number of POD mates you must respond to is outlined in each assignment, but if you respond to more that does help with participation credit. I'm a huge fan of collaboration. The questions will be posted on the POD sites. Because it is impolite to be late on assignments when your POD mates are counting on you, your grade is dropped one letter grade for each day you are late on the initial	Course Objective 1, 7, 8, 9, 10

posting. If you fail to respond to your POD mates by the due date, you are given a 0 for the assignment. If you know ahead of time you will have an issue with meeting the deadlines for a specific POD assignment, you may contact me before hand and we can discuss an alternative assignment to that weeks POD Site.

Option 2: Quizzes
For those of you who prefer to learn solo, the option is to complete four quizzes offered at four points during the semester. The quizzes are timed (90 minutes) and a combination of multiple choice, true-false, fill in the blank, open-ended, or short answer questions. You are allowed to use your book and other resources on Blackboard. Study guides will be provided. You may not use the Internet and you must work solo. Each quiz will be available for a total of 5 days. Study guides will be posted one week prior to the opening of the quiz.

Participation Your participation is desired and needed. We learn from one another and as professionals you are expected to bring your knowledge and experiences into our Collaborate discussions. Because you are accountable for your actions, I expect you to provide a fair assessment of your own participation. This allows you the opportunity to reflect on your willingness to engage and share with your peers. You will be requested to provide your own participation grade using the attached rubric after each Collaborate Session (NOTE: periodically I will ask that you email me your scorecard so please complete after each Collaborate session). Your self-grades will contribute to your overall grade. **See Appendix B for the self-participation grading form.** Rubric: 1% for completing bio on time; 1% of taking Syllabus quiz (You can take multiple times); 1% for completing mid-course evaluation; 1% for completing final evaluation; 6% for collaborate participation. Minimum expectations: - Attend the Collaborate sessions and arrive 5 minutes early. Please download the week's handouts from Blackboard prior to each session – we use these in group activities. You will not be penalized if you miss two sessions, but you need to notify me ahead of time or you will receive a 0 on participation for that week. If you miss more than 2 Collaborate Sessions you will need to have a conference call with me to discuss our options. - Engage in quality discussion in all venues we use. That means answering questions posed or offering examples to assist other learners - Treat information shared in class with professionalism, sensitivity, and confidentiality. - Prepare for each course by reading all requirement assignments. - Check UofL email at least three times per week. Course announcements will be made via Blackboard/email. Please note that you can also forward your UofL email to another account. *See tinyurl.com/2wnvk4f for instructions to forward Outlook email.* - Provide me with feedback and input about the course.	Competen cies 1,1, 1.2, 1.3, 1.4, 1.5, 1.6, 1.7 Course Objectives 2, 3, 4

Scholarly Analysis *(Doctoral Students Only)*	Competencies 1.3, 1.4
The scholarly analysis will be integrated with your Hallmark Assessment, making it of sufficient research quality to be accepted at a research-oriented professional conference (e.g., Academy of Human Resource Development, International Society for Performance Improvement, American Educational Research Association). Conduct a full Organizational Analysis Project (as is required for M.S. students), but integrate it with a targeted, 5-6-page review of the literature on an element of the topic being investigated and a 1-2 page discussion of how the literature and your findings intersect. In other words, you will transform the Organizational Analysis Project into an action-oriented research project. You will need to utilize at least 10 peer-reviewed references. In both your initial project idea and in your proposal, you will address the overall literature related to the topic you are addressing in your organizational analysis. In the abstract/proposal, you should introduce the literature on the topic, begin making your argument, and clearly explain what you will accomplish in your paper. *Assessment:* This assignment requires you to submit your action research project to a conference or publication.	Course Objectives 3, 11

Criteria for Determination of Grade

Master's Students		Doctoral Students	
Major Project (Hallmark Assessment) Organizational Analysis Project - Part 1 (20%) - Part 2 (15%) - Final Report (30%) - Presentation (5%)	70%	**Major Projects (Hallmark Assessment)** Organizational Analysis Project - Part 1 (20%) - Part 2 (15%) - Final Report (20%) - Scholarly Analysis (10%) - Presentation (5%)	70%
Other Projects **Option:** 4 PODs (20%) **or** 4 Quizzes (20%) Collaborate Participation (10%) - Participation is comprised of: Introduction (1%); Syllabus Quiz (1%); Mid-course Evaluation (1%); Final Evaluation (1%); Weekly Interaction 6%	30%	**Other Projects** **Option:** 5 PODs (20%) or 2 Quizzes (20%) Collaborate Participation (10%) - Participation is comprised of: Introduction (1%); Syllabus Quiz (1%); Mid-course Evaluation (1%); Final Evaluation (1%); Weekly Interaction 6%	30%
TOTAL	100%		100%

Grading Scale			
A+ 99-100%	B+ 91-92%	C+ 83-84%	D+ 75-76%
A 95-98%	B 87-90%	C 79-82%	D 71-74%
A- 93-94%	B- 85-86%	C- 77-78%	D- 69-70%
			F below 69%

Other Expectations of Participants
- Preparation for Class. Participants should be prepared for the collaborate session each week. This includes completing all readings and assignments. It is the participant's responsibility to contact me if unable to complete an assignment or participate in class.

- Timeliness of Work. All work is expected on time, unless prior approval has been obtained. Assignments not completed or turned in late will result in *at least* a one letter-grade reduction, unless unusual circumstances arise. The participant is responsible to contact me in advance at denise.cumberland@louisville.edu to make arrangements in these rare cases.

- Team Issues. Since this class consists of graduate students and adult professionals, I neither expect nor want to mediate team problems. Each team member is expected to work through any problems that arise. Additionally, each team member is expected to perform an equitable workload and to be accountable to other team members. In the unexpected event that a team cannot resolve problems independently, removal of an individual from a team is an option. In such case, documentation of problem resolution attempts should be shared with me. From that point, we will work through a process to resolve the problem.

- Formatting of Documents. Written assignments must meet general formatting standards of that American Psychological Association (2009). *Publication manual of the American Psychological Association* (6th ed.). Washington, D.C.: APA.

  Please note: Since your Organizational Analysis Project will also be shared with an audience other than myself, I ask that you format that document according to the norms of the sector in which you are working (e.g., a single-spaced business-style report). However, citation rules must be followed.

Policy Regarding Grades and Feedback
Given the nature of our field, I believe in providing developmental feedback on various aspects of the Hallmark Assessment, in order to encourage growth and improvement. Specifically, I provide feedback on Part 1 and Part 2, which is expected to be revised and included in the Final HAT. This editing helps your final work product since those sections are part of the final HAT Rubric.

Relevant U.S.-Based Websites/Professional Organizations
Academy of Human Resource Development (AHRD): www.ahrd.org
American Association for Adult and Continuing Education: www.aaace.org
American Society for Quality: www.asq.org
American Society for Training and Development (ASTD): www.astd.org

Association for Experiential Education: www.aee.org
HR People and Strategy: www.hrps.org
International Society for Performance Improvement (ISPI): www.ispi.org
Organization Development Network: www.odnetwork.org
Society for Human Resource Management (SHRM): www.shrm.org
Society for Organizational Learning (SOL): www.solonline.org

Policy on Instructional Modifications
Students with disabilities, who need reasonable modifications to complete assignments successfully and otherwise satisfy course criteria, are encouraged to meet with the instructor as early in the course as possible to identify and plan specific accommodations. Students will be asked to supply a letter from the Disability Resource Center to assist in planning modifications.

CEHD Diversity Statement
Diversity is a shared vision for our efforts in preparing teachers, administrators, school counselors and other professionals. Students will be encouraged to investigate and gain a current perspective of diversity issues (race, ethnicity, language, religion, culture, SES, gender, sexual identity, disability, ability, age, national origin, geographic location, military status, etc.) related to their chosen fields. Students will also have the opportunity to examine critically how diversity issues apply to and affect philosophical positions, sociological issues, and current events in a variety of areas. Students will examine their belief systems and be encouraged to reexamine and develop more grounded beliefs and practices regarding diversity.

Information on Plagiarism/Academic Dishonesty

If you want to borrow someone else's words in paper, simply *quote the words* and *cite the work*. If you want to borrow someone else's ideas, *you must cite the work.* If you do not do this, it's plagiarism.

Plagiarism is representing the words or ideas of someone else as one's own. An academic unit that determines that a student is guilty of academic dishonesty may impose any academic punishment on the student that it sees fit, including suspension or expulsion from the academic unit.

Please become familiar with Section 5 of the Code of Student Rights and Responsibilities: http://bit.ly/wBsp5e

Technology Expectations

The Collaborate sessions require your participation. You will need a headset with a microphone to fully and easily participate.

Continuing and regular use of e-mail is expected. You must be able to use Internet search tools, access Blackboard, Blackboard Collaborate, download and print documents, and upload assignments. All assignments must be submitted electronically in Blackboard.

All students enrolled in College of Education and Human Development (CEHD) programs are required to have a LiveText account. LiveText will be utilized for submitting a Hallmark Assessment Task (HAT) in every course in addition to other requirements by program (i.e., portfolios). If you do not already have a LiveText account, you will be required to purchase one for use during the courses in which you are currently enrolled.

A LiveText student membership may be purchased at *www.livetext.com* or from the University bookstore. Information about LiveText and how to purchase an account are available at https://louisville.edu/education/livetext.

Course Withdrawal

If you find this course does not fit your life plan or learning style and you choose not to continue, please contact your program advisor as soon as possible. You need to drop the course instead of just not attending anymore. Failure to withdraw results in a failing grade.

Bibliography

Academy of Human Resource Development (1999). *Standards on ethics and integrity.* Retrieved August 20, 2008, from http://data.memberclicks.com/site/ahrd/ethics_standards.pdf

Bolman, L. G., & Deal, T. E. (2008). *Reframing organizations: Artistry, choice, and leadership* (4th ed.). San Francisco: Jossey-Bass.

Coghlan, D., & Brannick, T. (2005). *Doing action research in your own organization* (2nd ed.). London: Sage.

Dirkx, J. M. (2005). Fostering ethical practice in HRD: Towards an ethic of the inner voice. In M. L. Morris (Ed.), *Academy of Human Resource Development Conference Proceedings* (pp. 23-30). Bowling Green, OH: AHRD.

DeVogel, S. H., Sullivan, R., McLean, G. N., & Rothwell, W. J. (1995). Ethics in OD. In W. J. Rothwell, R. Sullivan & G. N. McLean (Eds.), *Practicing organization development: A guide for consultants* (pp. 445-489). San Diego: Pfeiffer.

Robinson, D. G., & Robinson, J. C. (2008). *Performance consulting: A practical guide for HR and learning professionals* (2nd ed.). San Francisco: Berrett-Koehler.

Swanson, R. A. (2007). *Analysis for improving performance: Tools for diagnosing organizations and documenting workplace expertise* (2nd ed.). San Francisco: Berrett-Koehler Publishers.

Vogt, E. E., Brown, J., & Isaacs, D. (2003). *The art of powerful questions: Catalyzing insight, innovation, and action*. Waltham, MA: Whole Systems Associates.

Willmore, J. (2003). The seven (actually nine) deadly sins of new performance consultants. *T + D, 57*(8), 28-33.

Witkin, B.R., & Altschuld, J.W. (1995). *Planning and conducting needs assessments: A practical guide*. Thousand Oaks, CA: Sage Publications.

Other Books and Articles Used in the Preparation of This Course:

Curnan, S., LaCava, L., Sharpsteen, D., Lelle, M., & Reece, M. (1998). *W.K. Kellogg Foundation evaluation handbook*. Battle Creek, MI: W.K. Kellogg Foundation.

Gupta, K., Sleezer, C., & Russ-Eft, D. F. (2007). *A practical guide to needs assessment* (2nd ed.). San Francisco, CA: Pfeiffer/Wiley.

Hatcher, T.G., & Ward, S. (1997). Framing: An approach to performance analysis. *Performance Improvement Quarterly, 10*(3), 84-103.

Kaufman, R. (1996). *Strategic thinking: Identifying and solving problems*. Washington, D.C: International Society for Performance Improvement. Alexandria, VA: ASTD Press.

Kaufman, R., & Rojas, A. (1993). *Needs assessment: A user's guide*. Englewood Cliffs, NJ: Educational Technology Publications.

Lincoln, Y.S., & Guba, E.G. (1985). *Naturalistic inquiry*. Newbury Park, CA: Sage publications.

Mager, R.F., & Pipe, P. (1984). *Analyzing performance problems* (2nd ed.). Belmont, CA: Pitman.

Marshall, C., & Rossman, G.B. (1995). *Designing qualitative research*. Newbury Park, CA: Sage Publications.

McClelland, S.B. (1995). *Organizational needs assessments: Design, facilitation, and analysis*. Westport, CT: Quorum Books.

Miles, B.M., & Huberman, M.A. (1994). *Qualitative data analysis*. Thousand Oaks, CA: Sage.

Patton, M. Q. (2002). Qualitative research and evaluation methods (3rd ed.). Thousand Oaks, CA: Sage.

Rummler, G.A., & Brache, A.P. (1995*). Improving performance: How to manage the white space on the organization chart* (2nd Ed.). San Francisco: Jossey-Bass.

Russ-Eft, D. F., & Preskill, H. S. (2001). *Evaluation in organizations: A systematic approach to enhancing learning, performance, and change*. Cambridge, MA: Perseus.

Swanson, R.A., & Holton, E.F. (Eds.). (1997). *Human resource development research handbook*. San Francisco: Berrett-Koehler.

Swanson, R.A., & Zuber, J.A. (1996). A case study of a failed organization development intervention rooted in the employee survey process. *Performance Improvement Quarterly, 9*, 42-56.

Yin, R.K. (1994). *Case study research: Design and methods* (2nd ed.). Thousand Oaks, CA: Sage Publications.

Date Prepared and By Whom Prepared
Original class prepared by Dr. Mike A. Boyle, updated by Dr. Ray Haynes and Dr. Carolyn Rude-Parkins, redesigned and revised August 2008-April 2013 by Dr. Rod Githens. Updated by Dr. Denise Cumberland for Spring, 2016.

Course Schedule
Please note: This schedule is subject to change based on the needs of the group.

(BB) = Article or chapter available on Blackboard.

Week#	Date	Content	Required Readings	Assignments
1	1/12 (6:30 - 8:30) (you must be on @ 6:30 this first night)	Introductions; Overview of course; Expectations; Defining Needs Assessments	Altschuld / Kumar: Overview Chapters 1 and 2, pages 1-56)	Be prepared to discuss reading and answer questions during collaborate. Please create a bio page on BB by 1/12. Please complete the Syllabus Quiz by 11:59 pm on 1/12.
2	1/19 (7:00 - 8:30)	The NA Getting Started and Acitivites	Altschuld / Kumar: Overview SKIM Chapter 3, pages 57-78) Altschuld / Eastmond: Phase 1: chapter 3, pages 37 – 68 BB Reading: "Be Cool" (BB) Case Study (BB)	Be prepared to discuss reading and answer questions during collaborate. POD A: Posts due 1/19 by 6:00 pm Topics due for Needs Assessment due 1/19 by 11:59 pm (to be posted in Bb)
3	1/26 (7:00 - 8:30)	Initial Data Sources and Consulting	Altschuld / Eastmond, Phase 1, Chapter 4 (pages 69-90) and skim Chapter 6 Willmore, "The Seven (actually nine) Deadly Sins of New Performance Consultants" (BB) Case Study (BB)	Be prepared to discuss reading and answer questions during collaborate. POD A: Responses due 1/26 by 6:00 pm Quiz 1 Opens on 1/27 and closes on 1/31 @ 11:59.
4	2/2 (7 - 8:30)	Systems Thinking Asking the Right Questions	Bolman & Deal, "The Power of Reframing," ch. 1 (pp. 3-19) (BB) Bolman & Deal, "Simple Ideas, Complex Organizations," ch. 2 (pp. 20-40) (BB) Vogt et al., "The Art of Powerful Questions" (BB)	Be prepared to discuss reading and answer questions during collaborate. POD B: Initial Post due 2/2 by 6:00 pm. Submit Part 1 of HAT by Saturday 2/6 before 11:59 pm (use Template Provided)
5	2/9 (7:00 - 8:30)	Starting Phase II- Mixed Methods	Book: Phase II, Collecting Data:	Be prepared to discuss reading and answer questions during

			Chapters 1 & 2, pages 1 - 34)	collaborate.
			Book: Phase II, Chapter 4 Epidimology pages, 59-82)	POD B: Responses due 2/9 by 6:00 p
			Swanson, "Data Collection Methods," on BB	
6	2/16 (7:00 - 8:30)	Data Gathering: Surveys	Book: Phase II, Collecting Data: Chapter 3, pages 35 - 57)	Be prepared to discuss reading and answer questions during collaborate. Quiz 2 open from 2/17 – 2/21 @ 11:59 pm (covers all reading between weeks 4 – 6)
7	2/23 (7:00 - 8:30)	Data Gathering: Qualitative And Ethics	Book: Phase II, Collecting Data: Chapters 5, pages 83-105 (BB) DeVogel et al., "Ethics in OD," ch. 14 (445-489)	Be prepared to discuss reading and answer questions during collaborate. POD C: Initial Post due 2/23 by 6:00 pm
8	3/1 (7:00 - 8:30)	Qualitative Analysis	Book: Analysis & Prioritization; Chapters 1 & 2, pages 1-26)	Be prepared to discuss reading and answer questions during collaborate. Submit Part 2: Analysis Tool section of your HAT. Survey instrument or interview questions must be included.
9	3/8 (7:00 - 8:30)	Quantitative Analysis	Book: Analysis & Prioritization: Chapter 3, pages 27-59)	Be prepared to discuss reading and answer questions during collaborate. POD C: Responses due 3/8 by 6:00 pm. Quiz 3 open from 3/9 – 3/13 @ 11:59 pm (covers all reading between weeks 7– 9)
10	3/14	Spring Break		.
11	3/22 (7:00 8:30)	Prioritization; Fishbone; CCA	Book: Analysis & Prioritization; Chapters	Be prepared to discuss reading and answer questions during

| | | | 4 & 5, pages 61-97]) | collaborate.

POD D: initial posts due 3/29 by 6:00 pm |
|---|---|---|---|---|
| 12 | 3/29 (7:00 - 8:30) | Phase III: Taking Action | Phase III, Chapters 1, 2, & 3, pages 1-94 | Be prepared to discuss reading and answer questions during collaborate. |
| 13 | 4/5 (7:00 - 8:30) | Phase III: Post Assessment and Evaluation | Book Phase III, chapters 4, 5 & 6 | Be prepared to discuss reading and answer questions during collaborate.

POD D: Responses due 4/5 by 6:00 pm.

Quiz 4 opens from 4/6 – 4/10 @ 11:59 pm (covers weeks 11 – 13) |
| 14 | 4/12 (7:00 – 8:00 or 8:15 -9:15) | Presentations | | Presentations (you are to attend one 60 minute session. Those who present on 4/12 will not need to attend class on 4/19). But, Final HAT must be turned in on 4/12 to participate on this date.

Final HAT (see syllabus). DUE Tuesday 4/12 by 11:59 pm. |
| 15 | 4/19 (7:00 – 8:00 or 8:15 -9:15) | Presentations | | Presentations (you are to attend one 60 minute session. Those who present on 4/19 will not need to attend class on 4/12).

Final HAT (see syllabus). DUE Tuesday 4/19 by 11:59 pm. |

Hallmark Assessment Task for ELFH 662

Organizational Analysis Project

HAT Template provided on BB

Purpose and Process

This project provides the opportunity to apply hands-on skills in analyzing for performance improvement. You will develop and conduct a complete needs assessment or performance analysis in a real organization of your choice. Possible organization types include community-based groups, colleges/universities, corporations, healthcare organizations, military organizations, religious organizations, schools, and non-profit organizations.

This project includes the planning, development, implementation, analysis, and recommendations from a needs assessment or performance analysis. The process should be documented in the final report through the following components (suggested section titles are italicized):

Name of Project

- *Executive Summary* **(1-1.5 pages; Only include with Final HAT)**
  - Write a high-level overview of the project, your analysis, your findings, and your recommendations
- *Pre-Assessment & Planning (Part 1; ½ to ¾ page)*
  - *Scope of Analysis* – Outline the problem, process, opportunity, or issue that you will analyze *(pay special attention to clearly identifying scope of the issue and the purpose of this organizational analysis)*
- *Pre-Assessment & Planning (Part 1; 2-3.5 pages)*
  - *Overall Question* – Provide one or two "powerful questions" that dive deeply into the overall issue you are attempting to understand.
  - *System, Organization, Department, and Workgroup* – using your pre-assessment meeting(s) or interview(s) with client(s) or partner(s), you will develop an initial overview of the issues and setting with which you will conduct the assessment.
    - Describe the makeup of and issues facing the organization, department, and workgroup
    - Describe the *dominant* orientations and/or frames at work in the organization you're working with (see Week #4 readings)
    - Describe the orientations and/or frames that could help you and the clients *reframe* the problem.
    - Describe the larger system in which the Analysis is being conducted (i.e., both within the organization and the system outside the organization)
  - *Stakeholders*
    - Identify client(s) or partner(s) for this analysis
    - Identify and describe the "levels" at which stakeholders are located (see Witkin & Altschuld)
  - *Memo/Statement of Agreement with client provided - placed in Appendix*

- o *Work Plan/Timeline – placed in Appendix*
  (for teams, a more detailed project management plan must be included). In your final project the Workplan goes into the Appendix.

- *Analysis Tools (Part 2; 1 to 2 pages not counting your instruments)*
  - o Provide rationale for your data gathering approaches for the NA. Each of your two data collection options should be defended.
  - o Data Collection Instruments- You need at least **two or more** of the following data collection instruments: review of database archival records or social indicators; survey; observations; interviews; focus groups. These should be included in your Appendix.
  - o *Data Gathering* – Describe and justify your choice of the population, your sample, sampling method, and the solicitation process you will use.
  - o *Data Limitations* – Outline limitations of your data collection.

NOTE: You must submit Part 1 along with Part 2.

- *Findings (Final HAT)*
  - o Analyze and interpret the data. Use the data to (1) identify the end state desired, where things stand now, what the needs/discrepancies are (using the GAPS analysis); (2) prioritize needs; and (3) perform causal analysis to determine source of gap.
  - o Consider the ramifications of your analysis on the system, organization, and/or department/group
  - o *Data Summaries* – Provide neat and easy-to-read *summaries* of the data collected. *Do not include all of your raw data (e.g., transcripts of every interview)*

- *Recommendations for Implementation of Change (Final HAT)*
  - o Outline or describe an intervention or change process based on your analysis
  - o Make a case for how the data has informed your choice(s) in recommending changes
  - o Explain how the change(s) will benefit the organization (e.g., cost/benefit)
  - o Describe or diagram the force field analysis to consider the influences supporting and restraining the change.
  - o Describe which frames (Bolman & Deal, 2008) are reflected in your recommendations.
  - o Describe how framing and reframing influenced the way in which this project proceeded.
  - o Conclusion that includes limitations of your assessment.

Competencies and Standards

This project primarily contributes toward developing the "Investigate Gap" competencies of our HROD Program (2012) 1.1 Identify the environment and culture of the workgroup, 1.2 Analyze and interpret critical business issues and challenges, 1.3 Utilize evidence-based literature to guide inquiry, 1.4 Utilize appropriate inquiry methods, 1.5 Assess needs and opportunities, 1.6 Identify causal factors that limit performance, 1.7 Interpret results and make recommendations.

Grading Rubric for Organizational Analysis Final Report

	Exceeds Standards	Meets Standards	Needs Improvement
Pre-Assessment & Planning Section **(20 possible points)** HROD 1.1, 1.2, 1.3, 1.5	**19-20 Points** The planning section contains a clear, precise, and detailed explanation of organization, department, and workgroup. Background, structure, stakeholders, and context are considered and described. The explanation is exceptional in its clarity and precision. Plan is focused on a specific performance problem, process, opportunity, or issue that is described specifically and with details. Memo/ statement of agreement outlines the scope of the project. The plan describes the dominant orientations of the organization, orientations that could assist in reframing the problem, and has a clear understanding of systems thinking.	**17-18 Points** Plan is appropriate but is not exceptional. Lacks some features of focus, specificity, detail, or clarity.	**0-16 Points** Plan lacks focus, specificity, detail.
Analysis Tools **(25 possible points)** HROD 1.4	**24-25 Points** Includes at least two well-developed, focused, easy to use, and appropriate data collection instruments and or methodologies. These tools satisfy the identified areas of inquiry. Includes	**22-23 Points** Tools are appropriate but not exceptional. Lacking some of the features necessary for exceptional instruments.	**0-21 Points** Tools are not appropriate or lack multiple required features.

	justification explaining why specific instruments were chosen. The data collection process is grounded in the Organizational Analysis literature. The proposal contains a realistic timeline and work plan for completing the project with explanation of milestones. *For those working in teams, the proposal contains a project management plan.*	Timeline/work plan is appropriate but lacking some detail.	Timeline/work plan lacks significant detail.
Implementation of Analysis **(20 possible points)** HROD 1.6	**19-20 Points** Includes exceptionally attractive, concise, and easy-to-read summaries of the data. Includes exceptionally astute analysis of the data—goes beyond superficial conclusions and considers how the larger context impacts the data interpretation. Compellingly describes the contextual impact of findings.	**17-18 Points** Includes appropriate analysis of the data. Not exceptionally attractive, concise, or easy-to-read. Includes appropriate analysis of the data, but is not exceptionally astute in understanding the context and situation. Describes contextual impact in general terms.	**0-16 Points** Presentation of data is not appropriate. Interpretation is not appropriate and needs more depth. Does not include description of contextual impact.
Recommendations for Implementation of Change **(20 possible points)** HROD 1.7	**19-20 Points** Recommended intervention or change process is exceptionally well-considered and realistic, with clear links to the data Includes exceptionally clear and compelling explanation of how the change(s) will benefit the	**17-18 Points** Recommended intervention or change process is generally well-considered and realistic. Includes clear explanation of how the change(s) will benefit the organization.	**0-16 Points** Recommended intervention or change process is not well-considered and/or realistic. Does not include clear explanation of how the change(s) will benefit the organization.

	organization. Includes realistic and well-informed rationale for implementing changes. Includes well-developed analysis exploring influences supporting/ restraining the change. Includes exceptionally creative approaches to using the framing and reframing process for arriving at these recommendations.	Includes realistic and well-informed rationale for implementing changes. Includes analysis that describes influences supporting/restraining the change. Includes some evidence of using the framing and reframing process for arriving at these recommendations.	Does not include realistic and well-informed rationale for implementing changes. Does not include an analysis describing influences supporting/ restraining the change. Includes little evidence of using the framing and reframing process for arriving at these recommendations.
Process (15 possible points)	**14-15 Points** Report is exceptionally well written and is organized in a seamless manner. Report has the appropriate appearance to be presented to stakeholders in the organization. Executive summary provides stakeholders with excellent, succinct synopsis of the process, the analysis, the findings, and recommendations. Follows the 6th Edition of the APA Publication Manual when using/citing others' work.	**13 Points** Report is organized and well-written, but not of exceptional quality to be presented to stakeholders in the organization. Executive summary provides a succinct synopsis, but does not use the short space as wisely and succinctly as it could be used.	**0-12 Points** Report is not organized and written to the quality one would expect when presenting to stakeholders. Executive summary does not adequately convey the analysis and recommendations to stakeholders.

	GUIDELINE: Once two people have commented or offered advice to a POD Mate, you need to review the work of someone who does not have input from two people.	
APPENDIX A		

POD A	**What do you think?**	**DUE**
Your Initial Post	Outline your NA (Gap or opportunity). Provide enough information for your POD mate to react to whether you have isolated a need and offer their thoughts about the scope of the project.	1/19 by 6:00 pm
Responses to Your POD mates	React to at least 2 of your POD mates posts and help them identify the type of NA this might be (use your book). Offer suggestions for how to articulate the need or opportunity in question form. Discuss ideas on how to manage the scope of the project	1/26 by 6:00 pm

POD B	**Please help me with my MOA.**	
Your Initial Post	Insert your *Memo Statement of Agreement* to your client and ask your POD mates for assistance to ensure it covers everything,	2/2 by 6:00 pm
Responses to Your POD mates	Help at least 2 of your POD mates provide succinct and inclusive MOAs.	2/9 by 6:00 pm

POD C	**Fast Help Needed on questions and scales!!!**	
Your Initial Post	Go to "add an entry" and list your survey questions or interview questions (you will want to ensure these are legibile once you save). You may list all of you questions or only questions you are concerned might have issues. You may want help by asking what type of scale would be best to use (rank order, Likert etc.)	2/23 by 6:00 pm
Responses to Your POD mates	Using the "comment section" . . . Offer 2 of your POD mates suggestions based on what you have learned about good survey and/or good interview questions, as well as what scales might be best. Explain your thinking.	3/8 by 6:00 pm

POD D	**Ugh . . . I'm swimming in data . . . Please throw me a lifeline!!!!**	
Your Initial Post	Go to "add an entry" and share some aspect of your data analysis and/or presentation. I recommend you upload a section of data analysis or some charts. Ask for feedback from your POD mates.	3/29 by 6:00 pm
Responses to Your POD mates	Using the "comment section" . . . Based on what you have learned (be specific), please offer advice to at least 2 of your POD mates on their approach to data analysis or data presentation.	4/5 by 6:00 pm

APPENDIX B

Participation Self Grading Form

This is your opportunity to share the grade you believe you earned in our Collaborate Session. I will consider your self-grades along with my assessment to determine your final grade. I expect you to miss no more than two sessions and please notify me ahead of time.

Periodically I will ask you to send me this sheet or an email with your weekly grades so I can update my spreadsheet.

The recommended way to grade yourself for each Collaborate Session:	Point Value	My Grade
I read all of the material prior to our Collaborate Session:	**0- 40 points**	**?**
During the main discussion times I provided insights to my classmates or posed questions:	**0 - 25 points**	**?**
During the small group activity I contributed to the discussion.	**0 - 20 points**	**?**
During our :90 minutes on collaborate I did NOT use other technology (e.g. texting; surfing; etc)	**0 - 15 points**	**?**
Total		**?**

Please give yourself a grade between 0 - 100 points using the above criteria. If you were absent, just write 0/Absent. Since only 12 of the 14 grades are used this will not impact grade.

Week

1/12/16 _____ points
1/19/16 _____ points
1/26/16 _____ points
2/2/16 _____ points
2/9/16 _____ points
2/16/16 _____ points
2/23/16 _____ points
3/1/16 _____ points
3/8/16 _____ points
3/14/16 Spring Break
3/22/16 _____ points
3/29/16 _____ points
4/5/16 _____ points
4/12/16 _____ points
4/19/16 _____ points