THE ACHIEVE PROGRAM: A NEEDS ASSESSMENT AND JOB ANALYSIS FOR
HUMAN RESOURCE DEVELOPMENT

by

Ruth E. O'Rourke

Bachelor of Science, August 2008
Southern Illinois University Carbondale

A Research Paper
Submitted in Partial Fulfillment of the Requirements for the
Master of Science in Education Degree

Department of Workforce Education and Development
in the Graduate School
Southern Illinois University Carbondale
August 2010

DEDICATION

I would like to dedicate this paper to my mother and my children. To my mother, who worked as hard as I did for the completion of this paper, because she covered my life in areas that I could not. And my sons: Jacob and Ryne, who sacrificed our precious time together so I could complete my work. I hope this journey has taught you two that you are never too old to reach for a dream and to continue to educate yourselves throughout your lifetime.

ACKNOWLEDGEMENTS

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

CHAPTER 1

INTRODUCTION

Background

The argument that America is not in a recession has been debated and lost many times over.   The United States is in the deepest recession since the 1930s (Matthews, 2010). According to Conway (2010), this economic recession has prompted many to duck and cover, and many economists are making very gloomy predictions. Conway wrote, however, "scrutiny of the factors at play reveals that the coming decade will bring a great deal of opportunity" (p. 21) and the biggest economic boom ever. Until that era is reached, what must companies and higher institutions do to survive the here and now?

The organizations need a plan, a line of attack. The plan needs to move beyond defensive measures and knee jerk reactions. Companies need to take the offensive and plan strategically. The government recognizes the need for more action than simply waiting for the economy to falter further and then present a counter attack. President Obama's economic recovery plan is designed to find solutions to the crisis and evaluate the United States Government to improve efficiency (Bingham, 2009). Unfortunately, Illinois has not seen enough relief from the President's plan so far. And the economic condition of the State of Illinois has placed a burden on state funded higher institutions. The institutions are considering drastic cost saving measures. Students cannot afford a tuition hike or loss of financial aid. To partial cost recovery institutions, fewer students equates to fewer dollars for operation. If the colleges cannot generate enough funds to sustain operating costs, services will be cut, jobs will be lost, and programs will be

eliminated. The decision falls on the universities to dispense budget cuts. Those cuts

prompt departments to locate areas of potential waste. Unfortunately, some of the cut

backs will include a reduction in employees. This makes the human resource department

a vital resource during these times. According to Molenda and Pershing (2003), higher

education institutions have to find ways to develop and deploy their human resources to

work strategically and efficiently to compete successfully in this (global) economy. One

tactic is strategic human resource development. The goal is to specify tasks and the

knowledge, skills, and abilities (KSA) required for a job as it will exist in the future

(Schneider & Konz, 1989). A strategic job analysis of staff positions administered by the

human resource (HR) department at a critical period such as this, could potentially find

the best candidates to compete and save jobs in the future. The application of a job

analysis to envision a position in the future implies that the job is not static and that given

the rapidly changing world, the job will most likely be modified in the future (Schneider

& Konz, 1989). The job analysis can also determine if there is a need to replace retiring

personnel. Does the position need to be filled to keep up with other companies in this

economy? Could those duties assigned to an employee that will be leaving the company

be redistributed to other staff members and save us financially? The question to be

answered is:

> To open a vacancy or not to open a vacancy—that is the question. While fiscal
>
> responsibility is in the hearts and minds of most organizations these days, they
>
> still have to run their businesses. So if there is a vacancy the organization can't
>
> live without, employers need to fill it. (Giacalone, 2009, p. 37)

The job analysis and needs assessment are important tools of strategic business

management and planning that can answer those questions. The state of the economy

makes both instruments essential to unearth financial waste.

Significance of the Problem

The Achieve Program (Achieve), at Southern Illinois University Carbondale, is a

comprehensive academic support service program for SIUC students with previously

diagnosed learning disabilities (Pugh, 2009). Achieve has seen a drastic decline in

enrollment from fall semester 2008 to fall semester 2010. Achieve is a partial cost-

recovery program and operates on student member support service fees. Achieve also

employs the third largest number of student employees on campus. The yearly average

hours paid for student employees is 30,000. Student wages have increased $1.75 per

hour since 2007.   Permanent staff salaries have also increased an average of 3% per year.

With fewer students, there are fewer funds to cover the operating expenses. Areas of

waste needed to be identified to alleviate budget strain. By identifying gaps in

performance of Achieve procedures with a needs assessment, recommendations can be

given to possibly save considerable program funds.

Some relief could possibly come to the budget through the retirement of the

Achieve Program coordinator in August. If the tasks of the coordinator could be assigned

to other employees with the knowledge, skills, and abilities (KSAs) to perform those

duties, the cost of the salary could be conserved. An analysis would determine the length

of reassignment. A job analysis of Achieve staff will be used to identify areas of

redundancy and possible redistribution of tasks from retiring personnel for additional savings.

Achieve position descriptions have not been updated for several years. Some positions do not have a position description on file. The job analysis will categorize duties and tasks and create new and/or updated position descriptions for each staff member to coincide with actual job functions.

Purpose of the Study

The purpose of the study was to contribute to a better understanding of budgetary constraints on the Achieve Program. More specifically, the study attempted to identify areas of unnecessary or superfluous spending on outdated methods, supplemental wages, and redundant processes. Funds need to be located for the continuation of non-state appropriated program accounts such as Achieve.

Statement of the Problem

The problem addressed in this study was: What operational processes should be examined and scrutinized (by implementing a human resource needs assessment and job analysis) to decrease expenditures for the Achieve Program at Southern Illinois University.

Research Questions

1. What gaps in performance can be identified through a needs assessment involving Achieve Program procedures to streamline processes, eliminate redundancy, and cut costs?

2. What duties and tasks can be redistributed based on a job analysis among Achieve Program staff members from retiring personnel to determine a timeline for replacement of the position?

3. What position descriptions need to be created and/or updated based on a job analysis involving Achieve staff members?

Definition of Terms

Job Analysis: Defined as the systematic process used to collect information about the duties, responsibilities, and necessary skills, for a particular job, so a job description can be written (York, 2010).

Needs Assessment: Defined as the process of collecting information about an organizational need or desire to improve current performance or to correct a deficiency (Barbazette, 2006).

CHAPTER 2

REVIEW OF RELEVANT LITERATURE

Overview

The problem researched in this study was: What operational processes should be examined and scrutinized (by implementing a human resource needs assessment and job analysis) to decrease expenditures for the Achieve Program at Southern Illinois University Carbondale. A review of literature was conducted to assist in answering the research questions stated. The scope of the study required research in three areas: (a) current human resource trends; (b) job analysis from a human resource perspective; and (c) needs assessment as a useful business tool.

The literature was collected from scholarly journal articles, dissertations, books, textbooks, and internet websites. The dissertations and journal articles were obtained from the Morris Library database utilizing a variety of search engines. The databases accessed most often included: Proquest, EBSCO, Ovid, Google Scholar, and JSTOR. The keywords used for searching included but were not limited to: *downsizing, company reorganization, economic recovery, human resources, job analysis, needs assessment, position analysis, performance review, recession, rightsizing,* and *task analysis*. All of the relevant literature was assembled, examined, evaluated, and integrated into the study to make recommendations, formulate conclusions, and illustrate the need for further research.

Literature Review

Current Human Resource Development Trends

"Incentives for early retirement, increasing demands for workforce productivity, and a projected shortage of skilled and experienced workers are powerful societal forces shaping human resource (HR) management and development practices in the workplace" (Stein, Rocco, & Goldenetz, 2000, p. 62) The demographics of the baby boom will mold the future of the workplace (Stein, Rocco, & Goldenetz, 2000). The authors penned that statement one decade ago. In a much earlier publication, Sheppard and Rix (1977) forecast that the nature of the workplace would be changing and adjustments should be made to promote policies to protect older workers in the work place. Neither article predicted the current economic situation and the impact on the American work force.

During this time of recession, organizations need to utilize strategic resources available to them. U.S. businesses cannot open a newspaper without seeing the warning that their only competitive advantage in the world economy is their employees and the knowledge they hold (Humphress & Berge, 2006). The authors indicated HR professionals' most important analysis to provide the companies is how they plan to initiate Human Performance Interventions (HPI). It is imperative that human resource development (HRD) is viewed as a valid established vocation capable of developing employees and providing guidance in these uncertain times.

The trend to recognize the need for ethical standards could help HRD become an established profession by bringing an improved impression of professionalism to those involved (Hatcher & Aragon, 2000). Other current trends that could promote the institution of HRD as a field include:

- Human resource development curriculums are developing.

- Practitioners and researchers in the discipline are unifying globally.

- Businesses are using HR professionals as integral partners for success.

- Global professionals are defining the meaning of *work*.

- Organizational interests in HRD are adopting a critical approach.

Since the field is emerging, academic programs are also changing and rising. Certificate programs and baccalaureate or higher degrees in HRD are being offered at over 250 universities and colleges (Kuchinke, 2003). The Academy of Human Resource Development (AHRD) has also created academic program standards in response (Kahnweiler, 2009).

Colleges are not the only entities recognizing the importance of HRD. Businesses are accepting human resource departments as integral parts of the organization. Instead of delivering clerical and administrative services, the role of human resource departments is increasing its activities (Lawler & Boudreau, 2009). They are becoming partners with each other. Successful outcomes are viewed as products of positive interactions between human resource departments and the other organizational processes (Way & Johnson, 2005).

The interest in HRD does not lie only with colleges and businesses in the U.S., but it is growing globally (Kuchinke, 2003). HR research is being conducted on a global scale. There has been a trend to switch from a positivism approach in research to the critical theory. The goal of the critical theory is to open up and expose the field to a new way of viewing routines and practices (Valentin, 2006). This trend is forging the best HR practices to be accepted globally (Ulrich & Brockbank, 2009). For the practices to be

adopted so widespread, there has to be a commonality among every culture in the world in defining work. Pace and change in responsibilities have accelerated making work more dynamic. Interactions between workers and organizational systems take place across international boundaries (Levine & Sanchez, 2007). Therefore, defining work in HRD internationally is also growing in popularity. Ardichvili and Kuchinke (2009) defined work as "central to human existence, providing the necessities for life, sources of identity, opportunities for achievement, and determining standing within the larger community" (p. 155).

Human resource development also has an identity among professions. It is widely recognized as a field with an identity that borrows from other fields such as psychology, education, sociology, organization behavior, communication, and other behavioral and social sciences.

Hatcher and Guerdat (2008) also suggested that journals, researchers, peers and scholars become more accepting and encouraging of innovative research in the field. The need for more theoretical research has also been suggested (Torraco, 2004).

There will always be a need for research as technology, society, and the world change. It is also important that the research be relevant to the field. Stone and Deadrick (2008) posed the question, "Does our research make important contributions to applied problems?" (p. 101). Researchers and practitioners may need to step back and review past discoveries, studies, and research in order to ensure the field of HRD continues to advance with development of theory, contributory research, and input for practice (Deadrick & Stone, 2009).

Communication between researchers and practitioners is one key to the successful advancement of human resource development. The communication now includes worldwide specialists as technologies continue to advance and developing countries become industrialized (Ardichvili & Kuchinke, 2009). HRD will continue to advance as a field, both locally and globally, as long as there are hard working professionals making progress and delivering exceptional work and value to businesses (Ulrich & Brockbank, 2009). Evolution of the functions of HRD professionals will coincide with the quickly transforming atmosphere of business. The role of developer and supporter of the learning environment is emerging as the HRD specialist is expected to anticipate, innovate and adapt to succeed (Valentin, 2006). In light of today's recession, it is imperative that HRD managers find alternatives to the massive downsizing that has occurred (Morrall, 1998). The HRD profession can earn merit by providing options to organizations that not only make for success but also survival in these troubled times. As progress brings resolution of issues and trends in the field change, there will always be a need for continued research in the field.

Job Analysis from a Human Resource Perspective

The process of ascertaining duties and tasks of a position is a useful tool. And many human resource functions involve the tool of a job analysis as an essential first step. Some examples include: recruitment for a position, job performance evaluations, developing training needs for a position, determining knowledge, skills, and abilities needed, career planning, improving work place safety, job classification, and redesigning a job (York, 2010). Job analyses create lists of the specialties needed for a position.

The advantages of conducting a job analysis are not recognized by all. Many organizations use informal HR staff discussions to determine what competencies should be modeled instead of basing the decisions on job analyses (Hartley, 2004). Competency modeling has also replaced traditional job analysis in many organizational human resource applications (Sanchez & Levine, 2008). Sanchez and Levine (2008) did suggest however, that the two could work together to supplement one another. Skills charting is also a method that documents the knowledge, skills, and abilities required for employees to be successful and connected to the company (Lyons, 2007). It integrates employee development into the method and is designed to improve performance quality. Although the definition is similar to job analysis, skills charting requires a separate discussion and is not included in this review.

There are a number of job analysis methods to collect the data needed. The process of job analysis can be lengthy depending on which approach is used. For each method, the objective remains the same:

> The objective is to determine what is required to perform a job and, in many cases, to compare requirements among jobs. The most common method of job analysis is a combination of interviews and questionnaires in which the incumbents describe their jobs. Although there are many approaches one might take to job analysis, there are three basic categories: (1) functional job analysis, (2) task-based analysis, and (3) factorial analysis. Each type of job analysis has its assets and limitations; there is no single most preferred method. (Guastello & Rieke, 1993, p. 2)

There are observation methods, both participant and video based. The diary method entails workers recording their daily activities. The Critical Incidents method collects data from important events that occurred on the job (York, 2009). The interview and structured questionnaire methods are self-explanatory and used in the creation of this study. There are several structured questionnaires available for use with a job analysis. This study includes a modified Position Analysis Questionnaire (PAQ). The PAQ, developed by Dr. Edward McCormick, P. R. Jeanneret, and Robert C. Mecham in 1972, is a structured job analysis instrument to measure job characteristics and relate them to human characteristics involved in work behaviors (HR Guide, 1999).

In 2004, Hartley introduced a job analysis at the speed of reality (JASR) method. The author stated that the entire process can be conducted in three hours and reap key benefits. Benefits of the Hartley JASR method include:

- Most positions can generate a valid task list in two to three hours.

- The detail and structure is similar to the three day analyses.

- This method requires a smaller number of resources.

- Validation of results occurs in real time.

- As soon as the session ends, derivative products can be developed.

- With review and practice, the process is easy to facilitate.

One more method is the DACUM workshop. DACUM is an acronym for Developing A CurriculUM (Workforce Education & Development, 2010). A workshop is conducted with a qualified facilitator over a two-day period to generate a detailed portrayal of the duties performed by the 5 to 12 selected subject matter experts (SME)

involved (Workforce Education & Development, 2010). This is an extremely beneficial analysis for a program that needs to clarify their mission.

The benefits of job analysis have been discussed in this review. There are also important concerns of job analysis accuracy found in the literature. "How do we know that job analysis information is accurate or true?" (Morgeson & Campion, 2000, p. 819). Levine and Sanchez (2007) discussed what constituted accurateness and inherent weaknesses in the conception of job analysis accuracy. Whichever job analysis technique is used, it is expected to consistently describe the same job from one administration to another (Patrick & Moore, 1985). Patrick and Moore (1985) wrote that it is an important requirement that data from a job analysis reliably describe a job, yet little attention has been paid to this topic of accuracy. Levine and Sanchez (2007) even suggested the term of job analysis be replaced with the more appropriate term "work" analysis to address criticisms of the process. Therefore, there is a need for further research on the topic of accuracy in job analyses.

Needs Assessment as a Useful Business Tool

"Needs assessment is a diagnostic process that relies on data collection, collaboration, and negotiation to identify and understand gaps in learning and performance and to determine future actions" (Gupta, Sleezer, & Russ-Eft, 2007, p. 15).

A technique used to challenge groups to really improve and streamline the processes used is to ask questions – why, who, how, what, and when. It is rare that organizations could not be improved when the current processes are mapped out in some detail and then examined for places to eliminate redundant steps or streamline the processes in general (Zenger, Folkman & Edinger, 2009). A properly conducted needs

assessment can be a successful cost-solving tool to provide answers to development

questions (Snyder, 2004). One such common question, "is training the answer?"

Schilder (2004) suggested no amount of training will counteract poor design and

disorganized processes. O'Connor (2006) believed that the needs assessment is the least

well performed element of a training cycle. When something is not working, an

assessment needs to find out why and apply the proper solution. O'Connor (2006)

summarized a simplified three-step approach to needs assessment:

> "1. Identify the problems, issues, challenges, goals and priorities of the business.
>
> 2. Uncover gaps in performance areas.
>
> 3. After determining causes of the problems, recommend solutions" (pp. 16-17).

There are more needs assessment techniques available. Given that the goals of a needs

assessment are unique to each situation, a single universal method does not exist.

Needs assessments can be conducted in any given situation where a gap in

performance needs to be identified. This literature review focused on the aspect of HR

specialists utilizing the needs assessment to promote success in colleges and

organizations. The interest in HRD does not lie only with colleges and businesses in the

U.S., but it is growing globally (Kuchinke, 2003). HR research is being conducted on a

global scale. There has been a trend to switch from a positivism approach in research to

the critical theory. The goal of the critical theory is to open up and expose the field to a

new way of viewing routines and practices (Valentin, 2006). This trend is forging the

best HR practices to be accepted globally (Ulrich & Brockbank, 2009). For the practices

to be adopted so widespread, there has to be a commonality among every culture in the

world in the idea of "work". Pace and change in responsibilities have accelerated making

work more dynamic. Interactions between workers and organizational systems take place across international boundaries (Levine & Sanchez, 2007). Therefore, defining "work" in HRD internationally is also growing in popularity. Ardichvili and Kuchinke (2009) defined work as being "central to human existence, providing the necessities for life, sources of identity, opportunities for achievement, and determining standing within the larger community" (p. 155).

CHAPTER 3

RESEARCH METHOD AND NEEDS ASSESSMENT

Introduction

The problem addressed in this study was: What operational processes should be examined and scrutinized (by implementing a human resource needs assessment and job analysis) to decrease expenditures for the Achieve Program at Southern Illinois University. The research conducted in this study was descriptive. The methods used to generate data included a needs assessment and job analysis. The results from each project facilitated the answering of the three research questions.

This project was developed to meet a need at the Achieve Program. Due to recent economic shortfalls, the Achieve Program is facing a budget crisis. Solutions needed to be found that could help alleviate some of the strain. After much thought, the researcher decided to use apply some principles and tools gleaned while in the Workforce Education and Development (WED) program. The idea of a needs assessment was generated from the WED 461 Workforce Education Needs Assessment course.

Before the project was initiated, approval was sought from the Human Subjects Approval Committee at SIUC; approval was granted July 19, 2010 (Appendix G). The approval to complete the project is located in the appendices. Questions developed prior to the beginning of the project from research on needs assessment, job analysis, and position description, are located in Appendix A and Appendix B. The needs assessment was conducted as the first project. History and background information on the Achieve Program was given to familiarize readers with the operational system. The needs

assessment utilized three types of analyses: performance, task, and goal. The two performance analyses consisted of an informal interview generated by the "oh/so" method, and observations based on the "can/can't" method. The goal analysis collected data from a brief staff informal survey. Finally, the data were analyzed to produce a feasibility study for the Achieve Program procedures. The goal of the needs assessment of the Achieve Program procedures was to identify gaps and streamline performance of processes.

In addition, job analyses of current staff jobs were completed to create or modify obsolete position descriptions. Position descriptions that were on file were reviewed by the employees and the researcher. A brief paper survey based on a Position Analysis Questionnaire (PAQ) was distributed to the staff members to determine job task priorities. The survey was also used to identify obsolete areas of current position descriptions as well as to discover inherited duties not listed. Several positions did not have a position description on file, and therefore a new description was created from the findings. The pending retirement of the Achieve Program coordinator prompted a review of possible dissemination of her duties. The job duties of the position have mostly been temporarily reassigned.

Based on the findings of the needs assessment, recommendations were given to institute cost saving measures. Based on the findings from the job analyses, position descriptions were created and updated. Upon completion of this project, it was distributed to Achieve Program staff members for review.

Description of Organization

The Achieve Program is an academic support program for college students with learning disabilities (LD) and/or attention deficit disorders (ADD) who are enrolled at Southern Illinois University Carbondale. The Program is self-supportive and participation is voluntary and confidential. The Program is an institutional part of the University, but separate from the University's Disability Support Services office. Achieve is a cost recovery program, and as such, charges fees for the comprehensive services provided.

Students in the Achieve Program are included in the regular college curricula and campus life. Support services offered to all full-time members on an unlimited, as needed basis include: individual tutoring; notes provided by hired note takers; test proctoring, including extended time, private rooms, readers and scribes (if necessary); audio books in a variety of formats; remediation; developmental writing assistance (staff providing in depth writing training to meet the core curriculum requirements); an organizational group to meet the needs of students for whom time management, organization, and planning are deficit areas; access to a private, modern computer lab with assistive technology; LD specialists on staff, who supervise and advocate for students; an Achieve Program section of University 101, a three credit-hour class to help a student's transition to University life. The Achieve Program offers full-time support for students during the regular school year, and more flexible, but more limited support for students enrolled in the summer semester.

Note takers. The Achieve Program hires and assigns note takers to go into classes and take notes for members, or will transcribe tape recordings of the lecture materials for classes in which note takers are not placed.

Tutors. Individual and group tutoring sessions can be assigned to members for additional help in any of their courses.

Audio books. Assigned course texts and individual readings are read aloud by a student worker and supplied to the members on a flash drive or compact disc.

Proctors. Additional time will be allotted for members to complete exams and quizzes in a monitored room at the Achieve Program facilities.

Organizational assistance. One staff member is dedicated to provide guided time management and structure of assignments for the Achieve members.

History of the Achieve Program

The Achieve Program has provided academic support to SIUC students with learning disabilities since 1978. It was founded by Dr. Barbara Cordoni, who served as the Coordinator of Achieve until 2001. It was the first program of its type at a major university and has offered continuous service to students for over 25 years. It was originally supported through internal University funding. A three-year federal grant was awarded in the fall of 1980. Achieve was the first postsecondary support program at a major four-year university to receive federal funding of this nature. In August, 1983, "Project Achieve" became the Clinical Center Achieve Program due to the University's decision to "institutionalize" the Program, and finally in 2005, the name was shortened to the Achieve Program. The University committed itself to continuing the Achieve Program as a permanent part of the University structure. The Achieve Program was the first such program to be institutionalized by any college/university in the country. This has ensured that the quality support services that were began in 1978 will continue for many years to come.

Organizational Structure

The Achieve Program, although the number of total employees reaches 200 plus, is a relatively small department on campus. The department is part of a larger unit on campus called the Clinical Center. The Clinical Center falls under the supervision of the Vice Chancellor for Academic Affairs. The Clinical Center has a director, Dr. Brenda Gilbert, as the overseer. The Achieve Program coordinator reports directly to the Clinical Center director. All Achieve staff members report directly to the Achieve Program coordinator (see Figure 1). The entire staff interacts with each other on a daily basis and several positions are supervisory in nature.
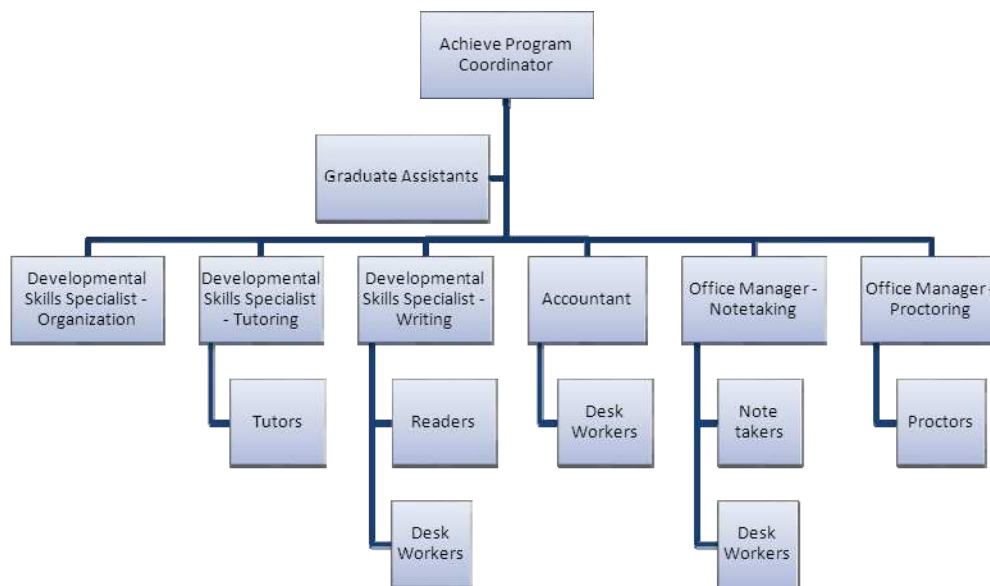
Figure 1. Achieve Program Hierarchy

Understanding the organizational structure will aid in the interpretation of the processes of the Achieve Program and the assessment that was conducted.

Needs Assessment Process

Schedule

This assessment began with an informal interview with the Achieve Program coordinator Sally DeDecker. Questions were developed prior to the interview as a starting point for the process. The questions were derived from information gathered in the WED 461 Workforce Education Needs Assessment course. The first question simply asked what the coordinator perceived as problem areas in the Achieve Program. The second question asked the coordinator to choose the most important areas of concern. The next several questions narrowed down the choices to a specific area that could be analyzed in the assessment process. The information obtained in that interview led to the next step and so on. Each step taken is listed in the schedule that appears as Table 1.

Table 1

Needs Assessment Schedule

Procedural Steps	Method	Stakeholders	Timeline/ Location
Performance Analysis	Oh, So Method	Program Coordinator Note-taker Supervisor Grad Assistants	July 6 Achieve Program
Performance Analysis	Can/Can't Will/Won't Method	Achieve Staff Graduate Assistants	July 7
Task Analysis		Achieve AP Staff Achieve Civil Service Staff	July 8
Goal Analysis		Program Coordinator	July 8
Staff survey	Collect data on reporting changes in schedule, number of schedule changes made in a semester and who was notified	Note-taker Supervisor Student Supervisors Grad Assistants Achieve Students	July 9-15
Feasibility Study		Achieve Employees	July 15

Note. The questions posed to the staff are attached to the end of this report.

Performance Analysis A

Oh, so analysis summary. An informal interview was conducted with the Achieve Program Coordinator, Sally DeDecker, on July 8, 2010, in the Northwest Annex Building C, Room 123. After a brief explanation of what is involved in a needs assessment, the researcher asked the coordinator if she could think of any areas of concern in the Achieve Program. There were several issues mentioned in the conversation. Using the "oh/so" method of interviewing, we narrowed the focus to some specific areas. Ms. DeDecker expressed areas of concern or in need of improvement at the Achieve Program upon her retirement due to a budget crisis.

Authority was given by the director, Dr. Brenda Gilbert, and the coordinator, Sally DeDecker, to conduct several paper surveys with the stakeholders and target population, conduct face-to-face interviews with staff, and conduct a task analysis by observing day-to-day operations and staff meetings. An agreement was made to share all information and results with the director, coordinator and possibly present to the other stakeholders. The stakeholders are the Achieve Program permanent staff, graduate assistants, temporary student employees, and Achieve Program students.

Performance Analysis B

Can/can't - will/won't method. Several questions from informal interviews led to observations made concerning the task of reporting student schedule changes to the note taker supervisor. The reasons for completing or not the completing the task were separated into four categories. The first category (can/will) consisted of staff that knew how to complete the task and did it correctly. The second category (can't/will) of staff would like to complete the task but do to some circumstance are not capable. The third

category (can/won't) did have the ability to complete it but refused to follow through

completely. The final category (can't/won't) did not complete the task and did not feel

they were capable of completing the task. The observations are summarized in Figure 2.
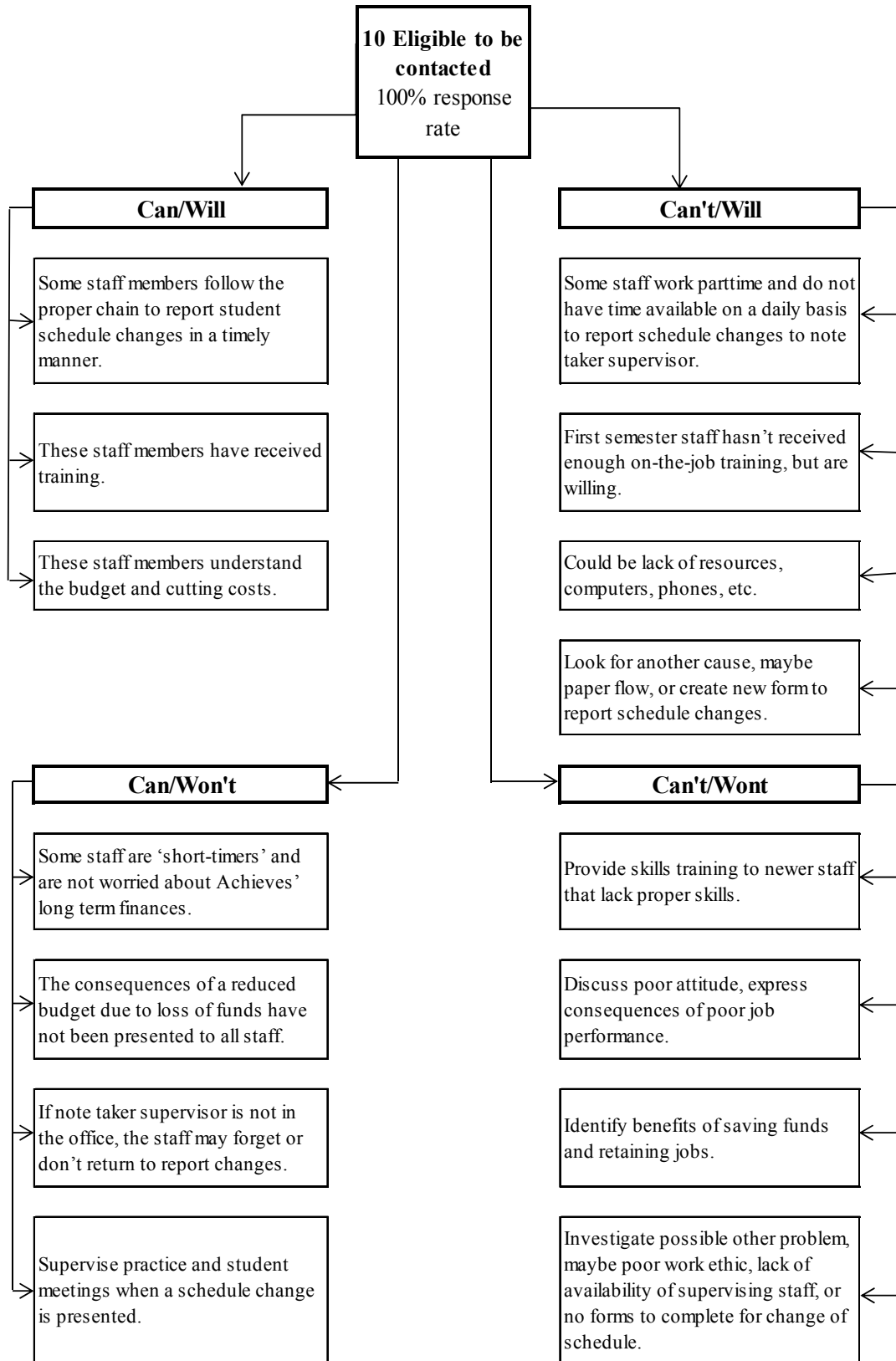
Figure 2. Can/Can't – Will/Won't Summary

Can/can't – will/won't summary. The stakeholders interviewed for this method were the permanent staff and graduate assistants. The informal interviews provided data for the matrix above. The ability to perform the task and a positive attitude towards the completion are present in most of those interviewed. Areas of concern and lack of performance were pinpointed by overlapping answers from the stakeholders. These areas are further analyzed in the following task analysis.

The majority of Achieve employees can perform the selected task of reporting student schedule changes, and want to follow the proper protocol. The task can be broken down into the following procedural steps:

1. Student changes schedule with appropriate department advisor outside of the Achieve Program and reports the change to the Achieve staff member.

2. Staff member makes a notation in the Achieve program student working file.

3. Staff member reports change to the note taker supervisor via phone call, email, handwritten note; or staff member tells another staff member; or the staff member does nothing.

4. The note taker supervisor contacts student employee to stop taking notes in the unnecessary course.

The problems within the program are centralized in step three. The external problems begin in step one. If the student does not report a schedule change to Achieve, the delay in stopping notes could be extensive. This needs assessment focuses on internal gaps in performance.

CHAPTER 4

NEEDS ASSESSMENT RESULTS AND RECOMMENDATIONS

Introduction

The problem addressed in this study was: What operational processes should be examined and scrutinized (by implementing a human resource needs assessment and job analysis) to decrease expenditures for the Achieve Program at Southern Illinois University.

Objective

The objective of the needs assessment was to define a gap in performance or process. As a result, the gap was defined as the delay in reporting changes in Achieve Program student schedules to the note taker supervisor from the Achieve staff. This resulted in payment of student employees that are no longer needed. The goal was to provide recommendations that will address the gap and save the Achieve Program funds lost due to wages paid to student note taker employees for pointless work.

Achieve Program Needs Assessment Participants

An informal survey was given to the target population of the Achieve Program. Of the 10 employees asked to participate, 100% of them agreed and gave feedback within the requested time period. The survey data collected from the respondents paints a picture of the overall makeup and the particular information process in question of the

organization which may be contributing to the performance gap. Table 2 represents the

data collected from the Achieve staff survey.

Table 2

Achieve Program Staff Survey Data Summary

Characteristic	*n*	%
Gender		
Male	3	30
Female	7	70
Total	10	100
Education Level		
Bachelors	2	20
Masters	7	70
PhD	1	10
Total	10	100
Hierarchy level		
Supervisor	6	60
Non-supervisor	4	40
Total	10	100
Amount of Training		
More than 5 hours	5	50
5 Hours	4	40
Less than 5 hours	1	10
Total	10	100
Necessary Skills		
Possess the skills	10	100
Lack the skills	0	0
Total	10	100
Preferred communication		
Email	6	60
Face to Face	3	30
Telephone	1	10
Total	10	100

Needs Assessment Results

The condition of the Achieve Program finances and its ability to support the continuation of the program is an urgent priority. Ms. DeDecker would like to implement some cost saving measures to improve the finances of the program in the months following her retirement. The interview provided some useful data for the project. Ms. DeDecker identified several areas of concern. She listed lack of follow through on processes, losing paperwork, poor use of work time, lack of work ethic, and misuse of program supplies, as problems. The researcher suggested that several areas could benefit from additional research. It was decided to taper the list down to a specific difficulty due time restrictions. After several "oh, so" questions, the possible areas of improvement were narrowed down to two specific targets. First, there is a gap in performance resulting in a lack, or delay, of communication between students and staff members concerning schedule changes and student employees assigned to those classes. This gap causes loss of funds from time paid to student employees for unnecessarily reading literature and taking notes in classes in which there are no Achieve members. There appears to be a delay of many days and sometimes weeks before the errors are caught and the student employees are reassigned. The longer the student employee takes notes in a class that is not needed, the more funds are loss. The student employee wage has increased by $2.00 per hour over the last two years. The last scheduled to increase went into effect on July 1, 2010.   Since more of the budget has to be allocated to cover this increase, it is more important than ever to prevent loss.

Second and most important, there is a need for a restructuring of the Achieve Program administrative and support staff upon the retirement of the coordinator. This

identification of this issue prompted a job analysis of Achieve Program staff. The job

analyses will be discussed later in this chapter. The remainder of the needs assessment is

focused on the first issue. The review of the Achieve Program data base of Report of

Services (ROS) produced data that states "Forty-two percent of the Achieve Program

students drop one course after the semester begins." Most drops occur early in the

semester. Freshmen are most likely to drop a course (see Figure 3).
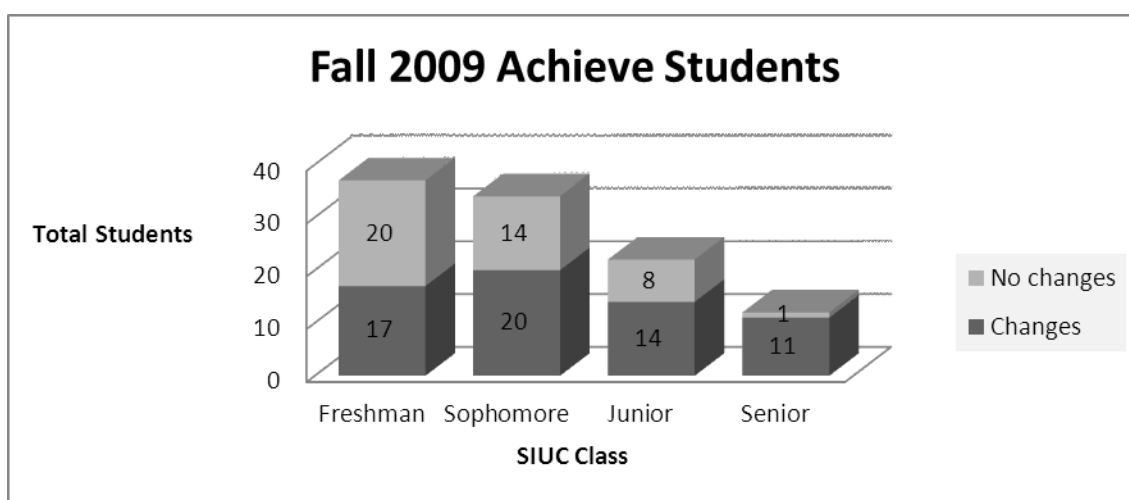
Figure 3. Graph of Achieve Student Changes

The delay in stopping the unwanted notes costs the Achieve Program $8.25 for

each hour of unnecessary notes that are taken. The student note taker supervisor

provided the statistic: The average time it takes to relay the change to the student

employee to stop taking notes in the dropped course is 1.5 weeks. This equates to one

hundred seventy one hours of notes paid for by Achieve that will not be used by any

student. As depicted in Figure 4, the cost of the needless notes is approximately $1,417.

50.
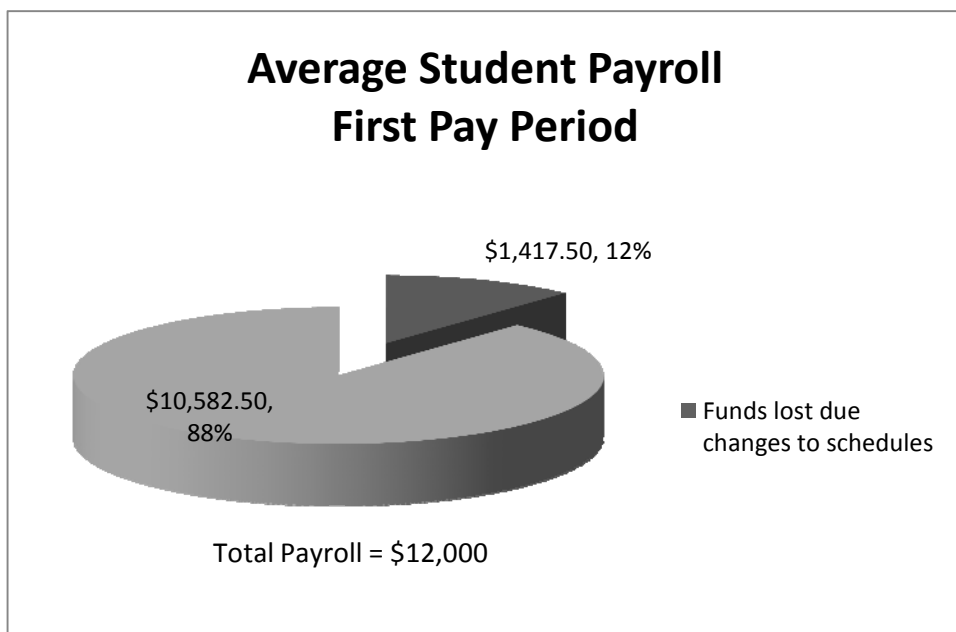
Figure 4. Chart of Achieve Student Payroll

Recommendations for Achieve Program Expenditure Reductions

Recommendation 1

Create a form to report student schedule changes in addition to the ROS and

provide training on use of the form.

Creation of form: 5 Hours of work @ $16.87 per hour = $84.35

Training: 1 Hour x 13 staff members @ $16.25 per hour = $211.25

Total costs for first semester payroll = $295.60

Total costs for following semesters = $211.25 (plus wage increases)

Continuing training costs for new employees each semester = $16.25 per each new

employee. Projected cost savings for semester after implementation: Strive for a 25%

reduction in the loss the first semester, 50% reduction the second semester, and increase

each semester thereafter. This method will not reduce the loss by 100% because it does

not include those Achieve students that make changes outside of the program and forget to report to staff members in a timely manner.

Cost savings for 1ˢᵗ semester payroll average: $354.37

Cost savings for 2ⁿᵈ semester payroll average: $708.74

Recommendation 2

Assign and train a student employee to check Achieve Program student schedules for changes once a week.

Training student employee = 1 hour student wages $8.25 + 1 hour staff wages $16.25 = $24.50. Student employee costs $8.50/hour x 5 hours x 8 weeks = $340

Total costs for first semester = $364.50

Total costs for each semester = $364.50 + (increases in wage rate)

Strive for a 50% reduction in the loss the first semester, 75% reduction the second semester, and increase each semester thereafter. This method will not reduce the loss by 100% because it does not include a daily check of schedules or time lapse between system updates.

Cost savings for 1ˢᵗ semester payroll average: $708.74

Cost savings for 2ⁿᵈ semester payroll average: $1063.11

Recommendation 3

Appoint a current staff member as a quarter-time program advisor. This advisor would work directly with the Achieve Program students to make schedule changes. The changes would then be reported directly to the note taker supervisor on a daily basis. Since the data above is working with only the first payroll, the total cost savings must be calculated for the entire year to justify the change in salary.

Total cost = $7500 per year*
*(Based on average salaries at Southern Illinois University Carbondale)

Strive for an 80% reduction in the loss the first semester, 95% reduction the second

semester. No method will reduce the loss by 100%, so a 5% margin of error has to be

assumed. Because the changes will be made at the Achieve Program, the reduction

projections are feasible. There are 26 payrolls in a year, but the majority of changes

happen in the first 8 weeks of each semester. Therefore the following cost savings were

calculated on an estimated basis.

Four pay period savings x 3 semesters: 80% x 1417.50 = $1134.00 x 3 semesters=

Cost savings for 1st year average: $3402.00

Cost savings for 2nd year: $4039.87

This recommendation may appear to be a negative cost savings. However, the staff

position additional assignment would add other benefits to the Achieve Program. Having

an adviser on staff would streamline the process of registration for Achieve students. The

ability to provide our students additional services on campus would help with recruitment

and retention.

Recommendation 4

Analyze the newly created job descriptions for potential change in the

organization**.** Reassigning the duties of the retiring coordinator on a temporary basis

could potentially save the program thousands of dollars. If reassignment took place for

one fiscal year, the cost savings would amount to that of a level five salaried position,

approximately $50,000 to $60,000. The decision to forego replacement of the

coordinator must be made by the director. Therefore, the following job analysis project

was completed to aid in decision making concerning the direction of the Achieve Program.

The conclusion of the needs assessment informal interview with Coordinator Sally DeDecker led to the basis for an additional project: job analyses of current Achieve Program staff members. The purpose of the job analyses was to inform the director, Dr. Brenda Gilbert, of current staff assignments. The information is useful for determining reassignment possibilities of the coordinator's duties as she retires. There are currently 6 permanent staff members. Civil service positions occupy three of the jobs. The other three are deemed Developmental Skills Specialists (DSS). Each of the DSS's has a specialty area.

The essential duties and responsibilities of each position have been summarized in the position descriptions included in Appendix C to Appendix H. Essential duties meet the following criteria: (a) the function must be done, (b) taking the function from the job would fundamentally change it, (c) the job exists to perform this function, and (d) there would be significant consequences if the function is not done. The most important item is listed first. Position descriptions were created and updated after obtaining data from each participant.

The presentation of data in the summary section focused mainly on the DSS positions and is included for informational purposes to further illustrate position functions.

Job analysis method. The job analysis method used was the structured questionnaire or PAQ, the informal interview, and data gathering from a computerized database. The purpose was to identify major job requirements and the knowledge, skills,

and abilities required for completion of the duties. Data collected consisted of: (a) job

contributions made to the objective of the unit; (b) essential functions of the job; (c)

examination of each essential function; (d) job setting; (e) and job qualifications. To

distinguish between similar job titles, specialty areas were added to the name. The

finished job descriptions for the DSS (Tutor supervisor), DSS (Audio Books supervisor),

DSS (Organizational supervisor), Office Manager (Notes), Office Manager (Proctors),

and Accountant, appear in the appendices.

Job analysis summary. The goal of this project was to provide information to

the director of the Clinical Center to assist in familiarizing her with staff job assignments.

Facts were gathered to assist the director with any supervisory evaluations of the Achieve

Program after the immediate supervisor retires. The results of the project provided

objective criteria available for review.

In the process of completing the job analyses, additional information was gathered

to further explain and distinguish the duties of the DSS's. The data was collected from

the Achieve Program ROS data base. The fall and spring semesters were utilized for the

staff hours' data collected as all areas would have reached maximum service load.

Summer hours are not included as the data would have been incomplete. A complete one

year time period was utilized to gather data on testing to encompass one full fiscal year.

This gave a more complete picture of the amount of services provided. Each position is

required to supervise, tutor, and assist Achieve Program students. The amount of service

provided to individual students by each staff member is summarized in Table 3.

Table 3

Staff Service Hours for Fiscal Year 2010

Staff Title	Tutoring	Supervision	Organization	Semester Total	Academic Year Total
DSS, Organization					
Fall 2009	106:00:00	42:55:00	8:45:00	157:40:00	
Spring 2010	16:50:00	22:20:00	29:00:00	68:10:00	225:50:00
DSS, Tutoring					
Fall 2009	40:45:00	21:55		62:40:00	
Spring 2010	55:15:00	20:45:00		76:00:00	138:40:00
Office Manager					
Fall 2009		15:00:00		15:00:00	
Spring 2010		12:00:00		12:00:00	27:00:00
Accountant					
Fall 2009	18:00:00			18:00:00	
Spring 2010	3:50:00			3:50:00	21:50:00
DSS, Writing					
Fall 2009	217:30:00	22:30:00		240:00:00	
Spring 2010	272:35:00	58:45:00		331:20:00	571:20:00

Note: Data is listed in hours:minutes:seconds

The Achieve DSS positions are also required to administer diagnostic tests. Each staff member has the capability of administering the entire range of instruments. Educational and training background in the administration of these instruments was not included in the data gathering activity. A further explanation of the type of tests and number given by each DSS is summarized in Table 4.

Table 4

Achieve Staff Test Administration for Fiscal Year 2010

Staff Title	WAIS	WJ	KTEA	TOWL	Tests TOAL	SLNG	WCST	WRAT	BRI	Total
Coordinator	48	0	0	0	0	0	0	0	0	48
DSS, Organization	0	8	9	7	5	1	21	8	5	64
DSS, Tutoring	5	34	7	0	4	1	12	8	6	77
Office Manager	0	0	0	0	0	51	0	0	1	52
DSS, Writing	1	0	0	46	27	0	6	0	0	80
Graduate Assists	0	12	38	1	18	1	15	38	42	165
Total	54	54	54	54	54	54	54	54	54	

Note: The dates used are May 1st, 2009 to May 1st, 2010

Needs Assessment Conclusion

Human resource departments are strategic business partners in organizations and offer alternatives to budget cuts and job losses in today's recession. Job analyses and needs assessments are two useful tools available to HR specialists. The goal is to help organizations evolve from survival in the present American economy, to transition into the global business world, and finally, to prospering in the future.

To recap, the purpose of the study from chapter one was to contribute to a better understanding of budgetary constraints on the Achieve Program. The study attempted to supply information to answer each of the research questions.

1. What gaps in performance can be identified through a needs assessment involving Achieve Program procedures to streamline processes, eliminate redundancy, and cut costs? The needs assessment provided an identification of a gap in performance

as related to question one. Based on the process of a needs assessment, recommendations were supplied to close the gap.

2. What duties and tasks can be redistributed based on a job analysis among Achieve Program staff members from retiring personnel to determine a timeline for replacement of the position? The job analysis does not attempt to make recommendations to the restructuring of current staff duties. Therefore, the answer to question two is open-ended.

3. What position descriptions need to be created and/or updated based on a job analysis involving Achieve staff members? The proposed question three led to the discovery of positions without a previous description and identified those in need of revision. The new position descriptions are supplied as a tool to the director.

The projects included in this study were based on tools available to human resource departments. As the economy continues to evolve, companies have the opportunity to change along with it. Reaching potential personnel can be done globally at the touch of a button. A human resource specialist can apply HR techniques to find the most qualified applicants. When the leadership and the HR department partner together, possibilities are endless. These projects are two examples of human resource assessments. There were no recommendations given that placed any staff member's job at risk of removal. The human resource specialist can operate only within the scope of the authority granted.

Recommendations for Practice and Research

Based on the findings of this study, the following recommendations are offered.

Practice

1. Formalize training for current and incoming staff at the start of each new academic year on Achieve processes. Set appropriate expectations for staff to complete the process of reporting student schedule changes in a timely manner. Assemble a set of forms and ensure that the staff recognized the importance of following protocol.

2. Advise students in this program to maintain a close relationship between student and supervisor. Students should be required to contact the supervisor when schedule changes have been made.

3. Strengthen the relationship between staff and the note-taking supervisor. Allow for weekly updates or memos from the supervisor to the staff regarding changes that have occurred in the previous week.

Research

1. Investigate the disadvantages of a traditional job analysis and needs assessment. A more appropriate method may be applied to the situation in need of evaluation. It is important to research both sides of an issue.

2. Investigate the methods of needs assessments in an educational setting. There may be more steps that would be beneficial to a needs assessment of an educational program. The processes of a higher institution could change or add steps to conducting a proper assessment.

3. Investigate the meaning of "accuracy" in job analysis. Search current journal articles to determine what experts constitute as accuracy.

REFERENCES

Ardichvili, A., & Kuchinke, K. (2009). International perspectives on the meanings of work and working: Current research and theory. *Advances in Developing Human Resources*, *11*(2), 155-167. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=37215278&site=ehost-live&scope=site

Barbazette, J. (2006). *Training needs assessment: Methods, tools, and techniques (Skilled trainer)*. San Francisco, CA: Pfieffer

Bingham, T. (2009). A new focus on performance. *T+D*, *63*(2), 14. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=aph&AN=36423893&site=ehost-live&scope=site

Conway, M. (2010). Coming: The biggest boom ever! *Futurist*, *44*(3), 20-23. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=aph&AN=48924489&site=ehost-live&scope=site

Deadrick, D., & Stone, D. (2009). Emerging trends in human resource management theory and research. *Human Resource Management Review*, *19*(2), 51-52. doi:10.1016/j.hrmr.2009.01.001

Giacalone, K. (2009). Making employees successful in any economy. *T+D*, *63*(6), 37-39. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=40928493&site=ehost-live&scope=site

Guastello, S. J. & Rieke, M. L. (1993). *The 16PF & leadership: Summary of research findings 1954-1992*. Retrieved from IPAT http://www.ipat.com/white_papers/Pages/default.aspx

Gupta, K., Sleezer, C. M., & Russ-Eft, D. F. (2007) *A practical guide to needs assessment* (2nd ed.). Retrieved from http://lib.myilibrary.com.proxy.lib.siu.edu/Browse/open.asp?ID=85624

Hartley, D. E. (2004). Job analysis at the speed of reality. *T+D, 58*(9), 20-22. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=14395140&site=ehost-live&scope=site

Hatcher, T., & Aragon, S. (2000). A code of ethics and integrity for HRD research and practice. *Human Resource Development Quarterly*, *11*(2), 179-185. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=11579108&site=ehost-live&scope=site

Hatcher, T., & Guerdat, K. (2008). Where is innovation in HRD research? *Human Resource Development Quarterly*, *19*(1), 1-5. doi:10.1002/hrdq.1222

HR Guide. (1999). *HR guide to the internet: Job analysis: Overview*. Retrieved from http://www.job-analysis.net/G000.htm

Humphress, R. & Berge, Z. L. (2006). Justifying human performance improvement interventions. *Performance Improvement, 45*(7), 13-22. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=24944601&site=ehost-live&scope=site

Kahnweiler, W. (2009). HRD as a profession: Current status and future directions. *Human Resource Development Quarterly*, *20*(2), 219-229. doi:10.1002/hrdq.20011

Kuchinke, K. (2003). Comparing national systems of human resource development: Role and function of post-baccalaureate HRD courses of study in the UK and US. *Human Resource Development International*, *6*(3), 285-299. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=10665461&site=ehost-live&scope=site

Lawler, E., III, & Boudreau, J. (2009). What makes HR a strategic partner? *People & Strategy*, *32*(1), 14-22. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=38508831&site=ehost-live&scope=site

Levine, E. L., & Sanchez, J. I. (2007). Evaluating work analysis in the 21st Century. *Ergometrika*, *4*, 1-11. Retrieved from http://www.ergometrika.org/Volume_4/volume4_no1_1.pdf

Lyons, P. (2007). Charting skills for quality improvement. *Journal for Quality & Participation*, *30*(1), 30-33. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=25605576&site=ehost-live&scope=site

Matthews, S. (2010, June 28). Jobless produce U.S. profit on productivity with less inflation. *Bloomberg Businessweek*. Retrieved from http://www.businessweek.com

Molenda, M., & Pershing, J. (2004). An integrative approach to performance

    improvement and instructional systems design. *TechTrends: Linking Research &*

    Practice to Improve Learning, *48*(2), 26-32. Retrieved from

    http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=t

    rue&db=aph&AN=13245789&site=ehost-live&scope=site

Morgeson, F. P., & Campion, M. A. (2000). Accuracy in job analysis: Toward an

    inference-based model. *Journal of Organizational Behavior, 21*(7), 819-827.

    Retrieved from

    http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=t

    rue&db=bth&AN=13620128&site=ehost-live&scope=site

Morrall, A., Jr. (1998). A human resource rightsizing model for the twenty-first century.

    Human Resource Development Quarterly, 9(1), 81-88. Retrieved from

    http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=t

    rue&db=bth&AN=11579099&site=ehost-live&scope=site

O'Connor, J. (2006, April). Shifting mindsets. *e.learning age*, 14-17. Retrieved from

    http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=t

    rue&db=bth&AN=21202664&site=ehost-live&scope=site

Patrick, J., & Moore, A. K. (1985). Development and reliability of a job analysis

    technique. *Journal of Occupational Psychology*, *58*(2), 149-158. Retrieved from

    http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=t

    rue&db=bth&AN=4617315&site=ehost-live&scope=site

Sanchez, J. I., & Levine, E. L. (2009). What is (or should be) the difference between competency modeling and traditional job analysis? *Human Resource Management Review*, *19*(2), 53-63. doi:10.1016/j.hrmr.2008.10.002

Schilder, J. (2004). Why training may not be the answer. *HR Professional*, *21*(6), 16. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=15233606&site=ehost-live&scope=site

Schneider, B., & Konz, A. (1989). Strategic job analysis. *Human Resource Management*, *28*(1), 51-63. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=7223203&site=ehost-live&scope=siteBusiness Source Complete database.

Sheppard, H. L., & Rix, S. E. (1977). *The graying of working America: The coming crisis in retirement-age policy*. New York, NY: Free Press

Snyder, M. G. (2004). The time-cost-quality triangle. *T+D, 58*(4)*, 17-19. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=12783629&site=ehost-live&scope=site

Stein, D., Rocco, T., & Goldenetz, K. (2000). Age and the university workplace: A case study of remaining, retiring, or returning older workers. *Human Resource Development Quarterly*, *11*(1), 61-80. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=11511488&site=ehost-live&scope=site

Stone, D., & Deadrick, D. (2008, September). Introduction to the special issue: Critical issues in human resource management theory and research. *Human Resource Management Review*, *18*(3), 101-102. doi:10.1016/j.hrmr.2008.07.010

Torraco, R. (2004). Challenges and choices for theoretical research in human resource development. *Human Resource Development Quarterly*, *15*(2), 171-188. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=13772350&site=ehost-live&scope=site

Ulrich, D., & Brockbank, W. (2009). The HR business-partner model: Past learnings and future challenges. *People & Strategy*, *32*(2), 5-7. Retrieved from http://proxy.lib.siu.edu/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=43594611&site=ehost-live&scope=site

Valentin, C. (2006). Researching human resource development: Emergence of a critical approach to HRD enquiry. *International Journal of Training & Development*, *10*(1), 17-29. doi:10.1111/j.1468-2419.2006.00244.x

Way, S., & Johnson, D. (2005). Theorizing about the impact of strategic human resource management. *Human Resource Management Review*, *15*(1), 1-19. doi:10.1016/j.brmr.2005.01.004

Workforce Education & Develoment, Southern Illinois University. (Producer). (2010). *What is dacum*? [DVD]. Carbondale, IL: Oakview Road Media

York, K. M. (2010). *Applied human resource management: Strategic issues and experiential exercises*. Los Angeles, CA: Sage

Zenger, J. H., Folkman, J. R., & Edinger, S. K. (2009). *The inspiring leader: Unlocking the secrets of how extraordinary leaders motivate.* New York, NY: McGraw Hill

APPENDICES

APPENDIX A

Achieve Program Staff Data Gathering Activity

Achieve Program Staff Data Gathering Activity

Objective:
The objective of the data gathering procedure is to determine the overall hierarchy of the Achieve Program's note taker stakeholders. It will also be used to discover how the flow of information is handled from top to bottom and vice versa.

Most of the demographic data was gathered from the Achieve Program data base. All of this information is available from SIUC Human Resources. Each question was informally discussed with the Achieve Program staff. This was not an exam, only an information gathering tool.

1. Gender was noted.

2. Highest level of education was noted. (Ex: M.S, PhD, K-12)

3. Job classification at the Achieve Program was noted. (Civil Service, Graduate Assistant, Administrative Personnel)

4. Which person in the Achieve Program hierarchy do you report directly to?

       a. The Program Coordinator

       b. A/P Staff

       c. A Graduate Assistant

       d. Civil Service Staff

       e. Someone outside of the Achieve Program.

5. Years of service were noted.

       a. First semester

       b. Worked more than one semester but less than 2 years.

       c. Worked at least two years, but less than 5 years.

       d. Worked at least 5 years, but less than 20 years

       e. More than 20 years

       f. Unsure how long worked.

6. How many hours of training have you received that pertain directly to information handling and exchange? A rough estimate will suffice. (exp. 5 hrs, 10 hrs) _____

7. Are there any skills that you feel were not presented but should be included in the training as it pertains to information handling and exchange?   Yes -or- No *If you answered yes, please explain below.*

_____
_____
_____
_____
_____

8. How would you rate the overall effectiveness of procedures in the Achieve Program?

    1 = Not effective at all.

    2 = Somewhat effective, but needs improvement

    3 = Meets program objectives

    4 = Very effective

    5 = Exceeds all expectations

9. Communication between the coordinator, all supervisors, student workers, and participants is best handled via:

    a. Telephone

    b. Email

    c. Personal appointments/Walk-in

    d. All seem to work equally

    e. I do not have to communicate with anyone.

10. The responsibility of information being handed to me rests with the:

    a. Graduate Assistant Supervisor

    b. Note Taking Supervisor

    c. Program Coordinator

d. Note Taking Student Worker

e. Program Participants

f. All play a vital role in information.

11. A participant has just made you aware of a class schedule change. Which program position(s) do you inform of the information. *Give all that apply*

___ the **tutor supervisor**.

___ the **note-taker supervisor**.

___ the **audio book supervisor**.

___ the **program coordinator.**

___ the **accountant or the proctor supervisor**.

___ I have no role to play in this information handling.

12. Several program participants have suddenly changed their class schedule. Which person(s) are you most likely to receive this information from? *Give all that apply*

___ the **note-taker student worker**.

___ the **note-taker supervisor**.

___ the **graduate assistant supervisor**.

___ the **program coordinator or other permanent staff**.

___ the **accountant or proctor supervisor**.

___ from the student.

___ I play no role in this information exchange.

APPENDIX B

Achieve Program Staff Survey Instrument

Achieve Program Staff Survey Instrument

Date: _____

Position Title: _____

Please list in order of importance, the top 5 tasks or duties assigned to your position, that you perform each semester:

1._____

_____

2._____

_____

3._____

_____

4._____

_____

5._____

_____

Please list any additional duties not included or added to your position description at the time of hire:

1._____

_____

2._____

_____

3._____

_____

4._____

APPENDIX C

Office Manager (Notes) Position Description

OFFICE MANAGER (NOTES)

Contribution to the Unit

The Office Manager serves a dual role as the note taking supervisor and typist for the Achieve Program. This is a 100% permanent civil service appointment with a salary commensurate between the minimum and midpoint range.

Job Functions

1) The main function of this position is note taking supervisor. Duties:

   a) Post position, hire and supervise student note takers (approximately 130 per semester). Contact professors concerning possible recruitment of students.

   b) Enter and maintain class schedules of Achieve students and note takers in database. Knowledge and competence with the SIUC Banner system is needed.

   c) Track completion of student employee ethics training in Fall Semester.

   d) Receive comments from graduate supervisors/Achieve students regarding performance of note takers and follows up on problems.

   e) Maintain files for each note taker, including schedule, classes assigned, absence requests, warnings, correspondence, and any other pertinent information.

   f) Bi-weekly, collect, review, and sign student pay slips before distributing them to other supervisors or Achieve accountant.

   g) Create and/or revise all forms for Achieve note taking.

2) The secondary function is typist. Duties:

   a) Type all reports of evaluation for Achieve Program clients (rough/final draft).

  b) Revise template for report as new tests are added/deleted.

  c) Edit write-ups for each section of report received from other staff as needed.

3) The third essential function is student lab supervisor. Duties:

  a) Hire and train student lab desk workers—6-8 per semester/year.

  b) Schedule work hours for desk workers.

  c) Create and/or revise all forms used by desk workers.

  d) Maintain records on copiers in the Student Lab.

  e) Contact Stiles Office Solutions, Inc. regarding problems with copiers.

  f) Order staples/toner for copiers.

  g) Monitor supplies needed (paper, folders, labels, staplers, etc.).

4) The fourth most important function is back-up payroll clerk. Duties:

  a) Enter student/civil service personnel hours worked into AIS system in absence of Achieve accountant.

  b) Complete online forms for unreported hours, quick pay, termination/ inactivation.

5) The final function consists of general office duties.

  a) Monitor supply of forms for inclusion in student/professional packets

  b) Provide customer service.

  c) Perform general office duties when requested.

KSA's Required for the Job

1) Working knowledge of the use of a Mac for word processing and skill in using Microsoft Word to enter, revise, and print word processing documents.

2) Keyboarding, transcription and proofreading skills.

3) Writing and organizational skills.

4) Familiarity with the Diagnostic Evaluation format used by the Achieve Program.

5) Effective communication skills.

6) Understanding of the various services offered at the Achieve Program and knowledge of the procedures established for handling requests for each specific type of service.

7) Knowledge of the Achieve Program's policies concerning confidentiality.

8) Skill in using FileMaker Pro 8.

9) Ability to multi-task.

10) Knowledge of general secretarial practices.

Job Setting

Minimal physical exertion is required in this position. This position requires many hours sitting at the computer and typing. There are daily interruptions by students and office staff into the Office Manager's relatively small office, and also in the entire space occupied by the Achieve Program. The resulting noise and confusion can make sustained concentration somewhat difficult. Training for specific duties occurs on the job as well as designated university training sites. The candidate should possess the necessary KSA's upon hire.

APPENDIX D

Office Manager (Proctors) Position Description

OFFICE MANAGER (PROCTORS)

Contribution to the Unit

The office manager serves a dual function as secretary for the Achieve Program and test proctoring supervisor. This is a 100% permanent civil service appointment with a salary commensurate with the midpoint range.

Job Functions

1) One of the main functions is test proctor supervisor. Duties:

   a) Interview, hire, train, supervise, assign work, and monitor time records for 30 to 40 student workers who serve as test proctors.

   b) Contact professors and/or departmental representatives to obtain exams to be proctored, schedule exam times for proctors and Achieve students, maintain sole security for exams until scheduled test times and oversee the return of completed exams to academic units across campus.

2) The second main function is secretary. Duties:

   a) Draft forms and compose form letters, respond to requests from parents or professionals for information concerning the Achieve Program.

   b) Assist Achieve students and visitors to the Program.

   c) Supervise the academic progress of three to six students each semester.

   d) Plan and schedule materials and facilities needed for parent and student orientation meetings.

e) Prepare correspondence for the coordinator and create multiple mailings each year as well as distributing incoming mail.

3) The third function is data entry of records. Duties:

a) Develop and implement computer records keeping systems (e.g., Report of Service database) for documenting student services administered by the Achieve Program. This involves an average of 13,000 – 15, 000 entries per semester.

b) Generate various summary reports as needed and keep supervisors of note takers, tutors and audio books appraised of the service hours of their student workers.

c) Organize and maintain basic information concerning students enrolled in the Achieve Program in separate databases.

d) Supervise/assist with academic registration and maintain records regarding academic progress of all Achieve Program members.

4) The next function is administration of diagnostic testing to prospective clients

a) Administer, score, report, and write results for the Slingerland Test.

b) Train additional staff in the administration of the Slingerland.

KSA's Required for the Job

1) Knowledge of general secretarial practices.

2) Advanced working knowledge of the use of a PC for word processing and record keeping. Extensive knowledge of databases, including the ability to adapt databases to document and track a number of different Achieve Program functions. Knowledge of the university Banner System.

3) Thorough understanding of the strict security policies and procedures involved in proctoring exams.

4) Understanding of the general University structure in order to make needed contacts or to direct Achieve students and visitors to appropriate Campus units.

5) Organizational and supervisory skills to maximize the use of available student work staff in order to meet the clerical and proctoring needs of the Achieve Program.

6) Complete understanding of every aspect of the Achieve Program so that accurate information can be provided when inquiries are directed to this position.

7) Knowledge and understanding of learning disabilities and diagnostic testing instruments in relation to the characteristics and needs of learning-disabled young adults.

Job Setting

Minimal physical exertion is required in this position. This position requires many hours sitting at the computer and typing. There is a large volume of traffic in the Office Manager's relatively small office, and also in the entire space occupied by the Achieve Program. The resulting noise and confusion can make sustained concentration somewhat difficult.

APPENDIX E

Accountant Position Description

ACCOUNTANT

Contribution to the Unit

This position is responsible for all financial transactions relating to the Achieve Program. This is a 100% permanent civil service appointment with a salary commensurate between the minimum and midpoint range.

Job Functions

1) The main function is to prepare and monitor the fiscal year budget. Duties:

   a) Monitor the budget and prepares necessary budget adjustment forms.

   b) Must be a fiscal officer delegate.

   c) Responsible for non-appropriated and foundation accounts.

   d) Make assessments of proposals possible effects on the budget and submit them to the coordinator.

2) The second most important function is to maintain electronic ledgers, reports, and appropriate files for the Achieve Program account. Duties:

   a) Ensure fiscal integrity by balancing internal records with SIU Administrative Information System (AIS) reports.

   b) Maintain an electronic spreadsheet ledger for all charges and collections and reconcile internal records with Bursar printouts.

   c) Prepare weekly and monthly fiscal reports for Achieve staff.

   d) Create new forms and reports for ease of processes as necessary.

3) The next most important function is responsibility for all purchasing and research of said purchases on the local and the foundation account. Duties:

a) Must be a Procurement Card (PCard) holder.

b) PCard manager for all cardholders on the Achieve Program Account.

c) All transactions for all PCard holders are entered by this position, reconciled and then sent to the Coordinator for final approval.

d) Prepare paperwork for new cardholders and adjustments.

4) The next function is contract specialist. Duties:

a) Prepare for new hires and continuing staff personnel.

b) Report fringe benefits bi-weekly and monthly.

c) Prepare change of assignments, terminations, and other adjustment paperwork.

5) The fifth most important function requires access to the AIS and Banner system's at SIUC. Duties:

a) Prepare billing for Achieve Program fees and submits to the Bursar office.

b) Access student records on the campus system for billing, addresses, schedules, and general information.

c) Training is required to obtain access to each of the SIUC systems.

d) Prepare paperwork for staff to obtain access to the systems.

6) An equally important function is payroll specialist. Duties:

a)   Prepare and reports student and civil service payroll.

b) Supervise student workers.

c) Assist in preparing paperwork of new hire student workers. Must be willing to proctor or tutor participants if needed.

7) This position also functions as campus liaison. Duties:

    a) This position must work with various Illinois and out of state Departments of Rehabilitation Services.

    b) Must communicate with many and various offices on campus concerning financial and student matters.

8) The final function is general duties. Duties:

    a) Coordinate some travel plans and prepares travel vouchers.

    b) Maintain inventory and submit forms for surplus property, lost or stolen items.

    c) General office duties.

    d) Tutor students when expertise is needed specific areas.

KSA's Required for the Job

1) Understanding of accounting principles and the ability to interpret and use information contained in fiscal reports.

2) Computer skills in both hardware and software.

3) Familiarity with the Achieve Program record keeping system as these relate to the preparation and maintenance of client files.

4) Communication and writing skills are a must.

5) Knowledge and understanding of the university structure and state requirements on financial procedures.

Job Setting

Minimal physical exertion is required in this position. Since there are so many facets to this position, the accountant must be self-disciplined and keep track of many projects at a single time. Also, there are numerous interruptions on a daily basis. Therefore, the accountant must be able to redirect his/her focus and return to previous projects when necessary. This position requires many hours sitting at the computer and typing in a private office.

APPENDIX F

Developmental Skills Specialist (Tutor Supervisor) Position Description

DEVELOPMENTAL SKILLS SPECIALIST

(Tutor Supervisor)

Contribution to the Unit

The DSS (Tutor supervisor) position serves a dual purpose as tutor supervisor and main recruiter for the Achieve Program. The DSS is the primary contact for new and potential students. This position is a 100% AP continuing appointment with a level 4 commensurate salary.

Job Functions

1) The main function is recruitment of new students. Duties:

   a) Attend university based and off-campus college fairs.

   b) Represent Achieve as the initial contact for potential students and parents.

   c) Process new student applications.

   d) Request application and diagnostic fees prior to testing.

2) The second important function is public relations and media development. Duties:

   a) Primary contact for inquiries into the Achieve Program.

   b) Develop new avenues to promote the program.

   c) Generate yearly newsletter.

   d) Meet with visitors to tour the Achieve facilities.

3) The next function is tutor supervision. Duties:

   a) Assign tutors for individual and group instruction.

   b) Hire and train new tutors (approximately 30 each semester).

c) Maintain a database with student schedules for tutor matching.

4) The next most important function is scheduling and administration of diagnostic tests.

Duties:

a) Create testing schedule and assign staff to individual tests.

b) Administer, score, and report results during staffing

c) Provide typewritten results to the typist.

d) Train graduate assistants in test administration.

5) The fifth most important function is supervision. Duties:

a) Supervise graduate assistants and students.

b) Provide graduate assistants feedback concerning testing.

c) Monitor assigned students' progress on a weekly basis.

6) Another function of this position is grant development. Duties:

a) Research grants appropriate for the program.

b) Write and submit grant proposals.

KSA's Required for the Job

1) Understanding of learning disabilities and the population Achieve serves.

2) Excellent communication and writing skills are a must.

3) Diagnostic testing skills.

4) Training in delivering instruction.

5) Computer knowledge of both hardware and software.

6) Knowledge and understanding of the university structure.

Job Setting

      Minimal physical exertion is required in this position. There are numerous interruptions on a daily basis in the office. Applicant must be able to work with interruptions. This position requires many hours sitting at the computer in a private office. This position also requires extended travel.

APPENDIX G

Developmental Skills Specialist (Audio Books Supervisor) Position Description

DEVELOPEMENTAL SKILLS SPECIALIST

(Audio Books Supervisor)

Contribution to the Unit

The DSS (Audio books supervisor) position serves a dual purpose as supervisor of both the audio books lab and the Achieve computer lab. The DSS is also the primary writing support personnel. This position is a 100% AP appointment on a fiscal year term contract with a level 4 commensurate salary.

Job Functions

7) The main function is to manage the audio books and computer labs. Duties:

   a) Hire, train, and supervise student employees for each lab.

   b) Research new equipment; maintain equipment and supplies in each lab.

   c) Process audio book requests; assign, track schedules, get books, delivery.

8) The second important function is to supervise, tutor, and provide individualized writing assistance. Duties:

   a) Advise and supervise 7 to 10 Achieve students per semester.

   b) Assist students in a variety of courses.

   c) Monitor student progress during supervision meetings.

   d) Guide students in research techniques.

   e) Provide writing assistance by appointment and on a walk-in basis.

   f) Access the Banner information system for student information.

9) The next most important function is administering diagnostic tests. Duties:

a) Administer, score, and report results during staffing

b) Provide typewritten results to the typist.

c) Train graduate assistants in test administration.

10) The next function is to instruct a section of University 101. Duties:

a) Teach and advise Achieve students enrolled in University 101.

11) The fifth most important function is representing Achieve at college fairs. Duties:

a) Attend university based functions and travel to off campus events.

b) Provide Achieve application information to prospective students.

c) Answer questions about the program.

KSA's Required for the Job

7) Understanding of learning disabilities and the population Achieve serves.

8) Excellent communication and writing skills are a must.

9) Diagnostic testing skills.

10) Training in delivering instruction.

11) Computer knowledge of both hardware and software.

12) Knowledge and understanding of the university structure.

Job Setting

Minimal physical exertion is required in this position. There are numerous interruptions on a daily basis in the office. Applicant must be able to work with interruptions. This position requires many hours sitting at the computer in an open office. This position also requires a minimal amount of travel.

APPENDIX H

Developmental Skills Specialist (Organizational Supervisor) Position Description

DEVELOPEMENTAL SKILLS SPECIALIST

(Organizational Supervisor)

Contribution to the Unit

The DSS (Organizational Supervisor) position is responsible for the organizational/time management assistance service area. This position is a 100% AP appointment on a fiscal year term contract with a level 4 commensurate salary.

Job Functions

1) The main function is to prepare supervise the organizational service area. Duties:

   a) Construct and modify organizational kits for each semester.

   b) Meet individually with students to assist with organization.

   c) Research and implement organizational/time management strategies for students.

2) The second most important function is case manager to Achieve students. Duties:

   a) Supervise 7 to 10 students per semester.

   b) Review and discuss syllabus for each course with student.

   c) Monitor student progress during supervision meetings.

   d) Update progress reports after student contact.

   e) Provide writing assistance and tutoring when necessary.

   f) Access the Banner information system for student information.

3) The next most important function is administering diagnostic tests. Duties:

   a) Administer, score, and report results on test given.

   b) Record all testing scores at staffing meeting.

c) Collect write-ups from staff and submit to the typist.

d) Contact parents after staffing to report results.

4) The next function is to maintain organization and test materials. Duties:

a) Keep track of testing materials.

b) Request purchase of materials from the accountant.

5) The fifth most important function is to represent Achieve at college fairs. Duties:

a) Attend university based functions and travel to off campus events.

b) Provide Achieve application information to prospective students.

c) Answer questions about the program.

KSA's Required for the Job

1) Understanding of learning disabilities and the population Achieve serves.

2) Organizational and time management skills.

3) Diagnostic testing skills.

4) Communication and writing skills are a must.

5) Computer and electronic device (i.e. mp3 players, recorders, etc.) knowledge.

6) Knowledge and understanding of the university structure.

Job Setting

Minimal physical exertion is required in this position. This position requires many hours sitting at the computer in a private office. This position also requires a minimal amount of travel. There are numerous interruptions on a daily basis.
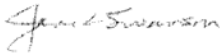
APPENDIX I

SIUC Human Subjects Committee Approval

Southern
Illinois University
Carbondale

To: Ruth E. O'Rourke

From: Jane L. Swanson, Ph.D.
           Chair, Human Subjects Committee

Date: July 2, 2010

Subject: *The Achieve Program: A Needs Assessment and Job analysis for Human Resource Development*

The revisions to the referenced study have been reviewed and approved by the SIUC Human Subjects Committee.

This approval expires on 6/30/2011, one (1) year from the review date. Regulations make no provision for any grace period extending beyond the above expiration date. Investigators must plan ahead if they anticipate the need to continue their research past this period. The application should be submitted 30 days prior to expiration with sufficient protocol summary and status report details, including number of accrued subjects and whether any withdrew due to complaint or injury. If you should continue your research without an approved extension, you would be in non-compliance of federal regulations. You would risk having your research halted and the loss of any data collected while HSC approval has lapsed. Extensions will not be required to continue work on an approved project when all the data has been collected, there will be no more interaction or intervention with human subjects and **subject identifiers have been removed** (e.g. during the data analysis or report writing stages).

Also note that any future modifications to your protocol must be submitted to the Committee for review and approval prior to their implementation.

Your Form A approval is enclosed. Best wishes for a successful study.

This institution has an Assurance on file with the USDHHS Office of Human Research Protection. The Assurance number is 00005334.

JS:kr

Cc: Marcia Anderson

SIUC HSC FORM A

REQUEST FOR APPROVAL TO CONDUCT RESEARCH ACTIVITIES
INVOLVING HUMAN SUBJECTS

CERTIFICATION STATEMENT

By making this application, I certify that I have read and understand the University's policies and procedures governing research activities involving human subjects. I agree to comply with the letter and spirit of those policies. I acknowledge my obligation to:

1. Accept responsibility for the research described, including work by students under my direction.

2. Obtain written approval from the Human Subjects Committee of any changes from the originally approved protocol **BEFORE** implementing those changes.

3. Retain signed consent forms in a secure location separate from the data for at least **three** years after the completion of the research.

4. Immediately report any adverse effects of the study on the subjects to the Chairperson of the Human Subjects Committee, SIUC, Carbondale, Illinois - 618-453-4533 and to the Director of the Office of Research Development and Administration, SIUC.
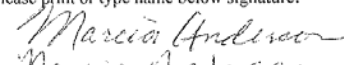   Phone 618-453-4531. E-mail: **siuhsc@siu.edu**

Project Title

The Achieve Program: A Needs Assessment and Job Analysis for Human Resource Development

RESEARCH ADVISOR'S ASSURANCE: My signature on this application certifies that the student is knowledgeable about the regulations and policies governing research with human subjects. I am aware of my obligations stated on Form A and will be available to supervise the research. When on sabbatical leave or vacation, I will arrange for an alternate faculty sponsor to assume responsibility during my absence. I will advise the Human Subjects Committee by letter of such arrangements.

_____   6/28/10
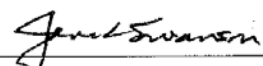Researcher(s) or Project Director(s)   RUTH E. O'Rourke   Date
Please print or type name below signature.

_____   6/28/10
Marcia Anderson   Date
Researcher's Advisor (required for all student projects)
Please print or type name below signature.

The request submitted by the above-named researcher(s) was approved by the SIUC Human Subjects Committee.

This approval is valid for one year from the review date. Researchers must request an extension to continue the research after that date. This approval form must be included in all Master's theses/research papers and Doctoral dissertations involving human subjects that are submitted to the Graduate School.

_____   7-2-10
Chairperson, Southern Illinois University Human Subjects Committee   Date

VITA

Graduate School

Southern Illinois University Carbondale

Ruth E. O'Rourke   Date of Birth: September 14,

1967

602 E Poplar Street, Du Quoin, Illinois 62832

Southern Illinois University Carbondale
Bachelor of Science, August 2008

Research Paper Title:

The Achieve Program: A Needs Assessment and Job Analysis for Human Resource
Development

Major Professor: Marcia A. Anderson, PhD.