Appendix D: Needs Assessment Planning Table

Type of Analysis	Framework and Key Questions	Data Sources	Data Collection	Analysis Plan
Problem or Opportunity	**Framework**: Gilbert's BEM **Key Questions:** • **Data**: What measurable impacts does the current lack of project coordination have on efficiency, workload, and costs? • **Instruments**: What systems currently exist for project management? How are they effective and how do they fall short? • **Incentives**: How do current project management practices impact motivation and engagement within the team? • **Knowledge**: Do team members have a clear understanding of how to best track and manage their projects? • **Capacity**: What workload challenges result from inefficient project tracking? • **Motives**: What are the main frustrations that team members have around current project management practices?	• **Executives/Leaders:** HR Leadership, Department Heads • **Target Population:** Instructional Designers, Facilitators • **Downstream Stakeholders:** Training recipients (employees, customers, or other end-users) • **Other Sources:** Existing project tracking systems, productivity reports / performance reviews	**Interviews** • **Individual, Semi-Structured:** With leadership, target population, and stakeholders to assess current project coordination challenges. • **Survey**: Measures perceptions of ownership, transparency, and accountability in project management.	**Approach**: Review policies, mission alignment, and leadership goals through documents and interviews. **Outcome**: Align project tracking system improvements with OptimaFlow's objectives and leadership priorities.
Environmental	**Framework**: Gilbert's BEM **Key Questions:** • **Data**: Have there been previous challenges that have prevented setting up a tracking system? • **Instruments**: What are the available budgets and technology? • **Incentives**: What incentives can leadership offer to support buy-in for a new workflow?	• **Upstream Stakeholders**: IT Department (for technology review) • **Downstream Stakeholders:** Other departments that rely on L&D support • **Industry Benchmarks**: Best practices from similar organizations	**Observation**: • Review how external trends are influencing the team's L&D project management practices. **Interviews:** • **Individual & Semi-Structured:** HR and IT stakeholders to assess external factors affecting project tracking	**Approach**: Compare OptimaFlow project management practices against industry best practices. **Outcome**: Use industry trends and best practices to improve project

	• **Knowledge**: What training or knowledge gaps might make it challenging for team members to use a new system? • **Capacity**: Does the team have enough resources and time to implement a new system? • **Motives**: How open are team members to learning new systems or adjusting workflow expectations?	• **Other Sources:** Research on project management trends and how they impact L&D outcomes.	**External review:**: • Review similar organizations' approaches to project management and identify best practices	management system in L&D team.
Organizational	**Framework: Gilbert's BEM** **Key Questions:** • **Data**: What organizational goals will a structured project management plan support? • **Instruments**: How do other departments manage their projects? Are there current practices or tools that can be adopted? • **Incentives**: What benefits does leadership see in improving project tracking in L&D? • **Knowledge**: Do L&D team members clearly understand OptimaFlow's expectations for project management? How are those expectations communicated? • **Capacity**: Does OptimaFlow have the resources to support a more robust project management system? • **Motives**: How would improving project coordination align with OptimaFlow's goals (or leadership priorities)?	• **Executives/Leaders:** HR, department heads and senior management • **L&D Team Leadership:** Managers or senior staff supervising ID and training team members • **Target Population:** Instructional Designers, Facilitators, and Project Managers in the L&D team • **Cross-Departmental Insights:** Staff from Sales, HR, and Engineering • **Other Sources**: Internal reports on efficiency, past project systems, and strategy documents	**Data & Documents:** • Review internal reports on team efficiency and previous project management efforts • Examine organizational policies and goals related to L&D and project tracking **Observation**: • Assess current project management tools and processes across departments **Interviews**: • **Individual & Group (Semi-Structured):** With L&D team members and leadership to understand systemic challenges and past obstacles • **Survey**: Teamwide survey to gather insights on project tracking issues and potential solutions.	**Approach**: Analyze internal policies, mission alignment, and leadership goals through documents and interviews. **Outcome**: Ensure project tracking improvements support OptimaFlow objectives and leadership priorities.
Gap	**Framework:** Gilbert's BEM **Key Questions:** • **Data**: What specific inefficiencies are caused by the current system? (ie repeated work, project delays, etc.)	• **Client**: Leadership overseeing L&D project management • **Target Population:** Instructional Designers and Facilitators • **SMEs:** Team members with strong project management	**Data & Documents:** • Review existing project tracking documents to assess current workflows and inefficiencies **Observation**:	**Approach**: Compare current and ideal project tracking to identify inefficiencies. **Outcome**: Measure the gap in project

	• **Instruments**: What would an ideal project management system look like? • **Incentives**: How would a structured system improve motivation and job satisfaction? • **Knowledge**: Could improved training or more transparent communication improve the system? • **Capacity**: What training or resources does the team need to transition to a new system? • **Motives**: What would motivate employees to engage in the transition to a new system?	skills who can identify best practices and gaps • **Upstream Stakeholders:** IT (if a tech solution is needed), HR (for alignment with staff needs) • **Downstream Stakeholders:** Employees and departments that rely on L&D programs • **Other Sources:** Existing project tracking documents and records of past project management efforts	• Identify where inefficiencies and redundancies occur in project management **Interviews (Individual & Semi-Structured):** • Gather insights from key stakeholders on current pain points and desired improvements	management effectiveness.
Cause	**Framework: Gilbert's BEM** **Key Questions:** • **Data**: How has the lack of a project management system impacted productivity? • **Instruments**: How do the current tools contribute to difficulties in project tracking or communication? • **Incentives**: Are there cultural or structural factors that make team members resistant to change? • **Knowledge**: How well do team members understand project management best practices and strategies? • **Capacity**: Is the current workload making it difficult for team members to manage their projects? • **Motives**: How have past workflow changes affected team morale and engagement?	• **Client**: Leadership overseeing L&D project management • **Downstream Stakeholders:** Employees and managers relying on L&D programs • **SMEs:** Team members with strong project management skills who can provide insights into problem areas • **Other Sources:** Past project documentation and records of historical inefficiencies	**Observation**: • Identify patterns in work duplication, bottlenecks, and coordination breakdowns **Interviews**: • Individual & Semi-Structured: Gather insights from employees and managers on perceived barriers to efficiency **Survey**: • Collect anonymous feedback on barriers to efficiency and perceptions of workflow challenges **Document Analysis:** • Review past project documentation to pinpoint systemic inefficiencies and recurring issues	**Approach**: Use the Behavior Engineering Model (BEM) to categorize causes (data, instruments, incentives, knowledge, capacity, motives). Use 5 Whys and/or Fishbone Diagram to confirm findings. **Outcome**: Identify key factors behind project inefficiencies.

Intervention Selection	**Framework:** Gilbert's BEM, SWOT **Key Questions:** • **Data**: How will we measure the effectiveness of a new project management system? • **Instruments**: What features need to be included in a new system, for it to be successful? • **Incentives**: What incentives can we offer the team to support buy-in? • **Knowledge**: What types of training will help team members transition to a new system? • **Capacity**: What strategies can support team members in successfully adopting a new system? • **Motives**: What communication strategies would help to support adoption of a new system?	• **Client**: Leadership overseeing L&D project management • **Target Population:** Instructional Designers and Facilitators (end-users of the new system) • **IT Department:** If a technology-based solution is being considered • **HR and Operations:** To assess alignment with organizational processes • **Other Sources:** Case studies and data from similar organizations	**Interviews**: • **Individual & Semi-Structured:** interviews with leadership to assess feasibility and adoption barriers • **Surveys**: Gather feedback from instructional designers and facilitators on preferred features and potential concerns **Case Studies:** • Review external best practices and similar organizations' project management improvement **Pilot Testing:** • Conduct a pilot test to assess usability, adoption, and effectiveness of solutions	**Approach**: Use SWOT analysis and benchmarking to evaluate potential solutions. **Outcome**: Select interventions that align with organizational goals, are feasible to implement, and offer the greatest (and most sustainable) benefit.