**Project Scope & Needs Analysis Worksheet**

*Customize this form for your project, expanding the rows and categories, as needed. See notes at end of worksheet for some possibilities for each category.*

**Project Description: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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|  | **Stakeholders**  (Key groups/individuals, funding entities, supervisors, SMEs, learners & learner groups) | | | **Expectations for Project Purpose, Goals & Results** | |
| **Stakeholders & Expectations** |  | | |  | |
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|  | **Project Roles**  (Project manager, designer, SME, reviewer, writer, graphic artist, web developer, programmer, facilitator/instructor, tester, evaluator, etc.) | | | **Project Responsibilities** | |
| **Project Roles & Responsibilities** |  | | |  | |
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|  | **Individual Asked** | **Perceived Problem**  (Gap between what is & what should be) | | **Causes/Indicators** | **Suggested Solution(s)** |
| **Perceived Problem, Causes/Indicators& Solution** |  |  | |  |  |
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|  | **Resulting Needs** | | **Instructional or**  **Non-Instructional?** | **Solution Alternatives** | |
| **Needs & Alternative Solutions** |  | |  |  | |
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|  | **Constraints**  (Geographic, cultural, or technical constraints; standards or regulations; quality/formatting requirements; schedule or funding limits; uncontrollable situational factors impacting success; support issues, etc) | | | | |
| **Constraints** |  | | |  | |
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|  | **Human Resources**  (Content or development expertise, SMEs, reviewers, testers, etc.) | | | **Non-Human Resources**  (Existing instruction or job aids that can be leveraged, funding, equipment, software, communications systems, materials, etc.) | |
| **Resources for Design/ Development** |  | | |  | |
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|  | **Human Resources**  (Facilitators, graders, technical support personnel, etc.) | | | **Non-Human Resources** | |
| **Resources for Implementation** |  | | |  | |
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|  | **People to Ask, Things to Observe/Study** | | | **People to Ask, Things to Observe/Study** | |
| **Analysis Methods** (Table 2.4) |  | | |  | |
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|  | **Needs 🡪** | | | **🡪 Goals** | |
| **Translating Needs into Goals** |  | | |  | |
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| **Who are your Stakeholders? (Examples of Stakeholders)** | **What is the purpose of the instruction? (Example purposes)** |
| * Clients, owner/operators, managers, shareholders, employees, tax accountants, the client’s customers, your customers, suppliers, partners, trainers or training coordinators * The general public, tax payers, government officials, government agencies, * School administrators, school districts, parents and parent organizations, teachers, grant recipients, grant providers * Community and social service organizations, people served by aid agencies, funding agencies, accreditation and credentialing organizations, * Department heads, faculty and staff, alumni, undergraduate students, graduate students, post-doctoral and research staff, * Patients, doctors, nurses, or other medical professionals, * Learners of all types and ages, * Your own supervisor. | * To inform * To educate * To improve performance * To foster transfer of learning to new situations * To provide just-in-time information for those who need it on the job * To encourage collaboration to solve problems or creatively construct innovations * Other?? |