



Sample Form for Project Intake with Client Questions (from Table P1.1)

PROJECT INTAKE FORM with CLIENT QUESTIONS		
Client Contact, Department, Organization: Instructional Design Lead:		
PROJECT DESCRIPTION:		QUESTIONS FOR CLIENTS & THINGS TO CONSIDER
PROJECT SCOPE	Primary Learner Audience, Other Audience(s)	• Who is the primary learner? • Are there secondary or tertiary audiences? • Who else might also be impacted but not explicitly included? • What do we know about learners' backgrounds, identities, and prior experiences? <i>To uncover hidden assumptions and systemic inequities embedded in design decisions, designers should consider...</i> • Are there groups who may face barriers to participating or succeeding? • What assumptions might we be making about learners' skills, technology access, time, or support? • Who might be unintentionally excluded by this design?
	Need(s), Performance Context	• What specific need(s), problem(s), or challenge(s) could benefit from an instructional solution? • What is the current, existing situation that you consider problematic? • What is the ideal situation? • What is the "gap" (need) between the existing and ideal situations? • What are the demands of the future performance context where learners will use their new knowledge and skills? • Are there any related needs that cannot be met with instruction? (e.g., workflow, logistical, scheduling, budget, availability, etc.)
	Goals & Anticipated Benefits	• How should the instruction or training address the Need(s) above? • What will it look like if the instruction is successful? What will result? (e.g., impact on bottom line, staff performance, operations)



		• Are we designing for compliance—or for meaningful engagement? • How will this instruction support long-term growth, not just immediate performance? • How might learner needs align—or conflict—with organizational goals?
	Scope & Content	• What topics, knowledge, and skills should learners acquire? Please describe each. • What should learners be able to do differently after this experience, and how should it impact their confidence, practice, or decision-making? • Are there attitudes or values you would like the learners to acquire, develop, and/or change as part of this experience? • How much / How long / How many? • How will we ensure examples and case studies are inclusive, representative, and accurate? • What long-term changes do we hope to see (practice, culture, equity)?
RESOURCES & CONSTRAINTS	Budget / Resources	• What is the anticipated budget for the project (time and resources)? • How will the project be funded? How resilient is the funding? How vulnerable is it to organizational cuts?
	Subject Matter Experts, Pilot Testers	• Who will serve as subject matter experts (SMEs) for the project? • Will we work with specific project managers/administrators or directly with SMEs? • Time availability – How many hours per week are SME’s available to meet, to provide raw, unfinished content, and to review draft content? • Is there a plan in place to protect SME time to work on the project? • Are there individuals available to pilot test the instruction who are representative of the learner audience?
	Content Availability & Readiness	• Are there any existing materials or resources available which can be used or repurposed for the instruction? • What might need to be developed/created/revised? • Is the existing content aligned with project learning goals? • Is content organized with a clear outline?
	Time or Budget Constraints	• Are there any contingencies to note or plan for?



		• What deployment-specific costs are anticipated? (Travel? Technology fees? Facilitator fees? Software or platform licensing? 3rd party content?)
	Technology or Delivery Constraints	• What delivery locations or platforms are available/must be used? • Is learner access or connectivity an issue due to system or platform limitations? • Are there access, compatibility, or usability limitations to anticipate?
	Organizational Constraints	• What constraints have affected similar projects in the past? • What systems must the solution work with (LMS, EHR, etc.)? • What support (IT, training, help desk) is available after launch? What IT policies or requirements will apply for security, compatibility, and integration? • What internal policies or norms might influence design decisions? • Are there expectations around standardization vs. flexibility? • How open is the organization to iteration and change after launch? • What structural barriers might limit success (e.g., workload, staffing shortages)?
	Content Constraints (standards, compliance, accreditation, quality)	• Are there legal, regulatory, compliance, or accreditation standards the instruction must meet? • Are there topics requiring special treatment due to cultural or organizational norms? Are there cultural considerations (social or organizational) to address? • Will translation or localization be required? • Is proprietary or classified content to be addressed?
PROJECT PARAMETERS	Timeline	• What is the expected project timeline, and/or deadlines for design, development, and delivery? • When do you want to implement this instruction? • When can you start providing content and reviews for this instruction? (i.e., project deliverables) • What is the anticipated rollout date?
	Audience Size, Demographics, Prior Knowledge, Motivations, etc.	• How many learners and/or learner groups are there? • Any audience needs for accommodations to address accessibility, age, education level, or socio-economic level barriers? • What range of prior knowledge about the content is anticipated? • What are learner interests, motivations? • How much time can learners realistically dedicate to taking the instruction?



		• What is the average level of English proficiency? • Other audience qualities for which consideration is warranted?
	Stakeholders	• Which other stakeholders are involved? • To what extent do they support the project? • Beyond you (the designer) and the learners, are there other stakeholders who should provide input, approve funding, or benefit from this training? • Whose voices have not been included in defining the problem?
	Longevity / “Shelf Life”	• Will the usefulness of the materials expire (shelf life)? If so, when?
	Maintenance	• Will materials require updating in the future? How often will review need to be conducted for updates? • What is the plan for Course Maintenance & Management? • Revision cycle • Managing dynamic content • Learner responses • Feedback response • Phases/Iterations
	Potential Benefits & Harms	• What are the possible negative impacts on learners? • Could this design create stress, cognitive overload, or time burdens? • Are there risks of reinforcing stereotypes, bias, or inequities? • Could learners feel watched, judged, or unsafe in this environment? • What happens if learners fail? Are there unintended consequences (e.g., job impact, stigma)? • Could this design disadvantage certain groups (e.g., language learners, neurodiverse learners)? • Could any content be interpreted as insensitive or exclusionary?
	Legal, Copyright, etc.	• What accessibility standards must be met to comply with FERPA, HIPAA, ADA/Section 504/508, or other regulations (e.g., e.g., WCAG 2.1)? • Are there risks of over-surveillance (e.g., tracking, proctoring tools)? • What existing materials will we use, and who owns them? • Do we have copyright permissions/licenses for all content (images, videos, cases, assessments)?



		• Are we allowed to adapt or remix these materials? Should we prioritize open educational resources (OER)? • How will we ensure content is usable by those with diverse needs? • Are accommodations reactive or proactively built into the design?
DELIVERABLES	Instructional Course, Module, Unit	• What is the nature of the final deliverable(s)? (e.g., Canvas Course, RISE Course, Job Aid, Single Video, Webpage, Hub) • Are there size or format requirements? • Are branding requirements or special accessibility to be addressed? • Will recordings be needed in languages other than English? • Other requirements or desirable features?
	Stand-alone Learning Product(s) (video, podcast, microlearning, etc.)	
	Interactive Activity or Assessment	
	Supplemental Materials	
EVALUATION & DATA SOURCES	Data Collection & Use	• Will you collect data? What learner data will be collected, stored, or shared? For what purpose? • How will that data be used, stored, and shared? • How will learners be informed about data use and consent? • Are learners aware of and consenting to data collection? • Does baseline data exist for comparison purposes? • Could data be used in ways that negatively affect learners? • Are there FERPA, HIPAA, or other compliance considerations?
	Return on Investment (ROI) vs. Return on Expectations (ROE)	• ROI = cost vs. measurable output (efficiency) • ROE = alignment with values, expectations, and meaningful impact • What data should be collected to show ROI? Benchmarks? (e.g., lower staff turnover rate, income, time saved) • How will we know if expectations are met? • What qualitative evidence (feedback, stories, observations) matters? • What indicators go beyond completion rates or test scores? • What does success look like from various stakeholder perspectives? (e.g., leadership, instructors/facilitators, learners, others?) • What would make this project feel “worthwhile” to stakeholders? • What changes should we see in real-world settings (not just course completion)?