

Project Intake Form

Use this document to provide information about your request for support on a new training initiative. Email the completed form to amy.lee3@sfdph.org. A member of the CLI team will meet with you to discuss your needs, training solutions, and the project scope.

Name:

Organization:

Date:



Organizational Needs/Instructional Goals

What is the organizational need driving this training?

What should learners do differently as a result of this training (e.g. new observed behaviors)?

What is the level of training required? Mark all that apply.

- Level 1: Awareness
- Level 2: Knowledge attainment
- Level 3: Application/skill development
- Level 4: Behavior change

What are some factors that may limit the success of this training?

Will this training be mandatory or elective activity for the audience?

Mandatory

Elective



Design/Delivery

What is the delivery format for this training? (Mark all that apply)

eLearning module (e.g. self-directed online learning)

Instructor-Led Training (in-person)

Webinar (e.g. live training on Zoom)

Would you like the webinar recorded and available for later viewing asynchronously?

Yes

No

Recorded presentation or video (e.g. "how to" video)

Hybrid Learning (e.g. mix of online and in-person training)

Instructional Manual/Job Aid

Other:

Additional details, if any:

What is the expected training length?



Where will the final training assets reside (e.g., learnsfdph.org, Sharepoint, website)?



Audience Analysis

Who is the primary (main or target) audience for the training initiative?

Who is the secondary audience?

Describe the primary audience's education level and general background.



Describe the primary audience's demographics (e.g. ethnicity, gender, sexual orientation, location, age, class, etc.).

Describe the primary audience's: 1) familiarity with the content; 2) comfort with training technology (e.g. LMS, Zoom); and 3) history of training in this area.

Describe the language needs, if any, that should be considered for both written and verbal content.

Describe any other special learning considerations or accommodations that should be considered for the audience (e.g. accessibility needs).





Evaluation Metrics

What does success look like?

What metrics do you want to track? (Mark the highest level)

Learner completion rates

Learner reaction (e.g. satisfaction, likelihood of referring a colleague to the training, etc.)

Learner knowledge acquisition (e.g., assessment scores)

Observable behavior change

Organizational impact (e.g., a reduction in XX rate, an increase use of XXX service/product, etc.)

Record any additional details about the evaluation metrics to collect (e.g. both immediate and long-term outcomes) and any other relevant data.





Budget/Timeline

What is the budget for the training initiative?

What are the funding source(s) (e.g. grants, department budget, etc.)?

What is the overall timeline including key deliverable dates and overall project completion date? Indicate when the training should be ready for dissemination.



SMEs/Stakeholders

Have the key Subject Matter Experts (SMEs) been determined? Yes or No? If Yes, list the SMEs & contact information.



List the key stakeholders (anyone impacting or impacted by this training such as learners, managers, trainers, funders, customers, clients, etc.).



Topics

Describe the current state of the content (e.g. powerpoints, videos, manuals, etc.).

List the major topics the training should cover.



Other comments and questions:

