



Intake Process Questionnaire

The purpose of this document is to provide a consistent output tool for data collected during the Discovering and Initiating Phases. The content from this document will then be used to populate the Project Charter Document and the Statement of Work documents used during the Initiating Phase.

FOS Partners to Engage - CONTRIBUTORS

Communication:	Curriculum:	Design:	Evaluation:	Delivery:	Marketing:

Section 1: PROJECT INFORMATION

1.1 Proposed Project Name: •		1.2a Contact Name: 1.2b Contact Phone: 1.2c Contact Email:		1.3. Area of Responsibility/Dept: •	
1.4 Executive Champion: •			1.5 Client Representative: •		
1.6a Content Owner(s) / SME(s): •		1.6b Reviewers: •		1.6c Final approval: •	
1.7 This project is for: ☐ Site ☐ Multi-Site ☐ Segment			1.8 List site(s): •		
1.9 List any other LOB, business units, and / or departments that may have a vested interest in this project: •					
1.10a Proposed Project Overview / Summary (including intended goal): •			1.10b Learning objectives: •		
1.11 Using the following 10-point scale, how critical is this learning project and its impact on business results? ☐ 1-4 = Nice to have; minor challenges for the business could result from not having a learning intervention ☐ 5-9 = Moderate challenges for the business could result from not having a learning intervention ☐ 10+ = Critical impact; significant challenges for the business could result from not having a learning intervention For a rating of 5 or greater, explain the business case/challenges: •					
1.12 Is this request for a compliance or regulatory learning solution? ☐ Compliance ☐ Regulatory					
1.13 Will this learning solution be required or elective? ☐ Required ☐ Elective Specify if not the same for the entire audience: •					
1.14 This request is for: ☐ Curriculum ☐ Design & Development ☐ Delivery ☐ Communication					
1.15 What funding (if any) has been designated for this proposed learning project? •					
1.16 Is the training associated with a new system implementation? ☐ Yes ☐ No If yes, when will the system be available and stable? •					
1.17 Comments: •					

Section 2: AUDIENCE / DEMOGRAPHICS

2.1 What position(s) / role(s) will be in the target audience?

- Engineering Services

If multiple roles, describe the similarities/differences among them. Specify hourly or salaried for each group.

Group	Type	Similarities	Differences
	☐ Hourly ☐ Salaried		
	☐ Hourly ☐ Salaried		

2.2 What other audiences (Lines of Business) would benefit from this learning?

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Are they considered part of the target audience? ☐ Yes ☐ No ☐ N/A

2.3 What is the total audience population?

2.4 How many participants do you expect per session?

2.5 How many participants do you expect annually?

2.6 Where are the learners located?

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Are they centralized or de-centralized? ☐ Centralized ☐ De-centralized

If de-centralized, please specify location and rough breakdown of learners per location.

DAK:	Epcot:	MK:	DHS:	Resorts:	International:	DLR:

2.7 What learning resources are available to learners? (e.g. space to learn, computers, access to centralized classrooms, etc.)

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2.8a Prerequisite skills needed to participate in this learning solution:

-

2.8b Prerequisite knowledge needed:

-

2.8c Prerequisite training needed:

-

2.9 In what languages will this learning solution need to be delivered?

☐ English ☐ Spanish ☐ Haitian Creole ☐ Vietnamese ☐ French ☐ Chinese ☐ Other - specify:

2.10 Comments:

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Section 3: TASK ANALYSIS

3.1 Is this training request part of a larger curriculum? ☐ Yes ☐ No If so, are there pre-requisites to this training? If yes, describe. ☐ Yes ☐ No ☐ N/A •		
3.2 What type of needs analysis has been conducted for this learning request? ☐ Formal ☐ Informal ☐ None		
3.4a Did the need analysis identify if there other factors not related to a knowledge gap or skill gap that need to be addressed to achieve the overall goal? ☐ Yes ☐ No ☐ N/A If yes, describe: •	3.4b Have appropriate non-DU partners been engaged to address the factors described in 3.4a? ☐ Yes ☐ No ☐ N/A	
3.5 How fundamental or complex is it to <i>learn</i> the tasks / behaviors? ☐ 1 = Very Fundamental ☐ 2 = Fundamental ☐ 3 = Increasingly Complex ☐ 4 = Complex ☐ 5 = Very Complex		
3.6 How fundamental or complex is it to <i>perform</i> the tasks / behaviors? ☐ 1 = Very Fundamental ☐ 2 = Fundamental ☐ 3 = Increasingly Complex ☐ 4 = Complex ☐ 5 = Very Complex		
3.7 How often are the tasks / behaviors performed? ☐ Daily ☐ Weekly ☐ Monthly ☐ Infrequently	3.8 Is this task / behavior critical to the performance of this role? ☐ Yes ☐ No	3.9 Do the Cast Members have prior knowledge concerning the tasks / behaviors? ☐ Yes ☐ No ☐ Varies
3.10 Are there written standards / guidelines supporting the tasks / behaviors? ☐ Yes ☐ No ☐ Varies		
3.11 Currently, are the proper tools and equipment available to perform the tasks / behaviors? ☐ Yes ☐ No ☐ Varies If no or varies, will the tools and equipment be available prior to the training for all locations? •		
3.12 You want your Cast Members to ____ the content provided in this learning experience. ☐ learn ☐ refresh ☐ relearn ☐ certify		
3.13 Comments: •		

Section 4: EXISTING CONTENT

4.1 Does content currently exist? ☐ Yes ☐ No If yes, is there an established revision cycle for the content? •		
4.2 Is the content currently being delivered? ☐ Yes ☐ No ☐ N/A If yes, what is the title? •		
4.3 What is the delivery method of the current content? ☐ N/A •		
4.4 What is the length of the current content? ☐ N/A •	4.5 Has the current training been in existence at least one year? ☐ Yes ☐ No ☐ N/A	4.6 What is the current facilitator or trainer/trainee ratio? ☐ N/A •
4.7 If this is to be converted from ILT to a technology-delivered solution, are there any other savings? ☐ Material savings ☐ Travel time savings ☐ Outside facilitator savings ☐ N/A If yes, explain. •		
4.8 What resources currently exist for this learning? Please check all that apply. ☐ N/A ☐ Self-paced text ☐ Scripts ☐ Videotape ☐ Audio tape ☐ Job Aid ☐ OJT ☐ Reference ☐ Classroom ☐ eLearning ☐ None ☐ Photos ☐ Graphics ☐ EPSS ☐ Other – specify:		
4.9 Can existing resources be adapted / redesigned? ☐ Yes ☐ No ☐ N/A Explain: • Update existing PPTs, photos, and processes to reflect the most up to date information.		
4.10a What are the benefits of these resources? ☐ N/A •	4.10b What are the limitations of these resources? ☐ N/A •	
4.11 What is the estimated percentage of the existing learning product that will be changed? ☐ 25% or less ☐ More than 25% ☐ N/A		
4.12 Does your organization have any internal resources available to assist with the work (i.e. SME)? ☐ Yes ☐ No ☐ Varies If yes or varies, describe internal resources: •		
4.13 Comments: •		

Section 5: SCOPE DEFINITION *(Please consult FOS Training Manager for this section.)*

Note: the estimate must be based on specific assumptions for each learning solution. At the time of the actual project, if we find the needed/desired learning solution varies from the assumptions made during the planning process we will assess the implications of the change in scope on project time and cost.

5.1 What is the proposed delivery method?

•

5.2 Will this proposed learning solution leverage new technology or a unique use of technology? ☐ Yes ☒ No

If yes, explain.

•

5.3 What is the proposed estimated length of the learning solution? (If multiple components, specify for each.)

•

WBT

5.4a What is the % proposed level of interactivity?

%	Awareness	low interactivity - true/false, click to reveal, basic content presentation
%	Comprehension	multiple choice, identification, drag and drop-type activities
%	Demonstration / Simulation	high-level activities, demonstrations, and simulations

ILT

5.4b What is the proposed level of interactivity?

	Lecture
	1 Activity per 2 hours
	2 Activities per hour

5.5a What is the % proposed level of animation?

%	Low	photographs and stock images
%	Mid	Custom created illustrations and basic animation
%	High	Advanced illustration and animation

5.5b What is the proposed level of script?

☐	Outline	utilized for experienced SME and strong facilitator
☐	Bullets	utilized for experienced SME and moderate facilitator
☐	Bullets with Transitions	utilized for SME and inexperienced facilitator
☐	Narrative Script	utilized for inexperienced or experienced facilitator and when consistency of delivery is crucial, i.e., regulatory training

5.6b What are the proposed number and type of collateral needed? Identify the number for each type needed.

	Worksheet
	Job Aid
	Workbook
	Poster
	Tchotchke (Small item/give away)
	Table Topper
	Other:

5.7a What is the proposed level of media?

%	Low	Stock
%	Mid	Custom created
%	High	Advanced

5.7b What is the proposed type of media?

☐	PowerPoint with minimal graphics
☐	PowerPoint with photos
☐	PowerPoint with custom graphics
PLUS	
☐	Audio
☐	Video
Specify:	

5.8 Comments:

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Section 6: IMPLEMENTATION

6.1 When is the preferred implementation of this learning solution? ☐ Q1 ☐ Q2 ☐ Q3 ☐ Q4 ☐ Other - specify:		
6.2 Is this preferred implementation date ☐ flexible ☐ tied to a specific roll out date? If tied to a specific roll out date, please explain and include specific dates: •		
6.2 List any and all stakeholders that need to be aware of this project prior to rollout (ex. PMO, HRBP, Executives). •		
6.3 How frequently will this learning experience be delivered? •		
6.4 For each learner, is this a ☐ one time learning experience ☐ recurring learning experience. If recurring, how often and for what reasons? •		
6.5a What is the intended duration of the learning solution before it needs redesign? •	6.5b If this learning solution is on an application or system, how stable is the system? •	6.5c When is the system scheduled for an upgrade? •
6.6 How will the learning solution be assigned or delivered? ☐ It be "pushed" ☐ It will be "pulled" ☐ It will be scheduled ☐ It will be just in time		
6.7 Comments: •		



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Section 7: DELIVERY & SUSTAINMENT

7.1 Can this delivery need be met through open enrollment classes? ☐ Yes ☐ No If not, where will they be delivered? For what reason? •		
7.2 Will the classes be delivered at the local areas? ☐ Yes ☐ No If not, where will they be delivered? For what reasons? •		
7.3 Who will be responsible for creating and maintaining the DDC scheduled offering? •	7.4 Who will be responsible for identifying and/or notifying the participants? •	7.5 Who will be responsible for monitoring participation and closing the DDC offering once the class has been completed? •
7.6 Is this a catered event? ☐ Yes ☐ No		
7.7 Comments: •		



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Section 8: EVALUATION

8.1 Based on the scope of this project (impact, need, strategic importance, etc.), are you planning a formal training evaluation? ☐ Yes ☐ No
8.2 What survey source would this project utilize? ☐ DU ☐ Survey Monkey ☐ FOS Training Center ☐ Focus Groups ☐ Other – specify:
8.3 In general, how will success of the learning be determined / measured? •
8.4 Will pre- or post-tests be utilized as part of this learning solution? ☐ Yes ☐ No For what reasons? •
8.5 What actions will be taken based on the evaluation results? •
8.6 Is there any evaluation/research history pertinent to this project? ☐ Yes ☐ No If so, explain. •
8.7 Comments: •



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Section 9: MARKETING

9.1 Course Title: •		
9.2 Course Description: •		
9.3 Desired Outcome of Marketing Efforts (include registration and capacity numbers, if applicable): •		
9.4 Target Audience Detailed Description: •		
9.5 Target audience location(s) ☐ Anaheim ☐ Glendale ☐ Burbank ☐ Lake Buena Vista ☐ Celebration ☐ Paris ☐ Hong Kong ☐ Shanghai ☐ Tokyo ☐ Other – specify:		
9.5a Learning logistics- Location: •	9.5b Learning logistics- Date: •	9.5c Learning logistics- Time: •
9.6 3rd party URL: •		
9.7 DDC Offering Active Date: •		
9.8 Special Requirements: •		
9.9 Type of Learning: ☐ Disney Classroom ☐ Special Disney Event ☐ Online Course ☐ Book ☐ Online Reference Materials ☐ Activity ☐ Audio/Video ☐ Community of Practice		
9.11 Desired In-Market Date: •		
9.12 Comments: •		



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Section 10: CLIENT READINES

10.1 Check the items in place to support the learning solution:

- ☐ Executive/Senior Leadership Support
- ☐ SME Identified
- ☐ SME Availability - for kick off and project duration
- ☐ Performance Alignment/ Ready for Implementation/Sustainment
- ☐ Cultural/Organizational Readiness
- ☐ Business Process Change
- ☐ Expansion