

STEP 1: INTAKE FRAMEWORK

SECTION 1: BUSINESS INFORMATION

- Business name:
- Date of inquiry:
- Description:
- Services required:
- Estimated start date:
- Engagement length:
- Contact name:
- Contact email address:
- Contact phone number:
- Website:
- Notes or background:

SECTION 2: DEAL BREAKERS/MITIGATION

Is the client involved with any of the following organizations?

Respond for each [Yes / No / Unsure / Comment]

- ICE
- FDNS
- Police forces
- Weapons manufacturers
- Disinformation organizations
- Extremist organizations
- Anyone on SPLC's [list](#)
- Civil, social and human rights violations / practices
 - If their negative impact is indirect... Does our project improve their practices?
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- Environmental shit like plastic
 - If their negative impact is indirect... Does our project improve their practices?
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SECTION 3: MISSION ORIENTATION

Does the potential partner consider human-centered design as part of their technology goals/needs?

[Yes / No / Unsure / Comment]

What population is served by the design or brand?

Is the design inclusive?

[Yes / No / Unsure / Comment]

Can we add value to make it more inclusive?

[Yes / No / Comment]

Do we have any control over the final delivery? What are the risks?

[Yes / No / Comment]

SECTION 4: PARTNERSHIP ALIGNMENT

Requires a total of **28 points** out of 39 points for a successful intake

- Organization type [Check one]
 - State (2)
 - Local (3)
 - Federal? (1)
 - Non-Profit? (3)
 - Foundation? (3)
 - Private? (2)
- Values (X/8) [Check all that apply]
 - Mission oriented? (3)
 - Socially impactful? (2)
 - Environmentally impactful? (2)
 - Innovative (1)
- Capabilities (X/11) [Check all that apply]
 - Client believes &Partners fills an expertise gap? (3)
 - Client wants to invest in building an internal team? (3)
 - Client has a dedicated team to work with us? (3)

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- Client is able to provide access to all stakeholders? (2)
 - Working Style (X/12) [Check all that apply]
 - Flexible with deliverables, trusting? (3)
 - Collaborative? (3)
 - Client is comfortable with remote work? (3)
 - Client requires minimal travel? (Does not include travel for research) (3)
 - Communication (X/5) [Check all that apply]
 - Transparent? (3)
 - Consistent? (2)

Alignment score: X/39

SECTION 5: PROJECT INFORMATION

Can we meet this timeline?

[Yes / No / Comment]

Do we have access to resources to complete this project?

[Yes / No / Comment]

Does the project have likelihood to grow/change drastically?

(Scope creep = bad // Additional projects = good.)

[Yes / No / Comment]

STEP 2: REVIEW AND APPROVAL

[100% of directors and up]

- Does the team agree the client is a good match? [Yes, No]
- Are there any reasons we would say no, even if it passes the intake framework? (e.g., previous bad experience with people on the team.)