

Turn network data into trusted insight

A fillable planning workbook for five connected lessons and one practical pilot.

Use the fictional Northstar Association example first. Then adapt the plan to one workflow you own. The course connects annual member returns, event feedback, organizer evidence and a voluntary follow-up study.

Download and open this PDF in a PDF reader that supports forms. Type in the shaded boxes and save a copy. You can also print it and write by hand. Some browser viewers handle saving differently: reopen your saved copy to check your answers.

Use fictional or de-identified material for practice. This workbook does not send or store your answers on a website. Completion is a planning exercise, not certification of an implemented system.

Your network question and one workflow to test

Who will help you test the plan? Record the owner and a review date.

1. Plan the collection

A collection map covering recurring returns, events, organizer evidence, studies and targeted consultations, with a purpose and useful return for each.

Practice context: M-12 submits an annual return; E-7 has event feedback; organizer files come from a separate source; P-18 joins a voluntary study.

For each stream: purpose | contributor | source/channel | timing | permitted linkage | useful return



Name shared and local fields. Which profile details can be reused, and when do they change?



Self-check: Can your colleague explain why each source is collected and what comes back to the contributor?

2. Analyze what arrives

An analysis plan separating source evidence, suggested interpretation, unresolved questions and reviewer decisions.

Practice context: M-12 reports 60 estimated people and 140 attendance entries. A file covers the previous quarter. A comment mentions scheduling.

For two findings: source | interpretation | uncertainty | reviewer | next action



What distinguishes a flag from a confirmed conclusion?



Self-check: Can another reviewer distinguish evidence from interpretation and reproduce the basis of your finding?

3. Connect the history

A relationship map and correction policy that preserve continuity without breaking anonymity.

Practice context: M-12 changes representatives and submits a corrected document. P-18 misses a study wave. Visitor feedback was anonymous.

Map organizations, people, events and submissions. Include relationship dates and versions.



Which linkage is prohibited? How will corrections and missing waves appear?



Self-check: Can your map answer both a member-history question and a study question without confusing whose evidence you are reading?

4. Agree the meaning

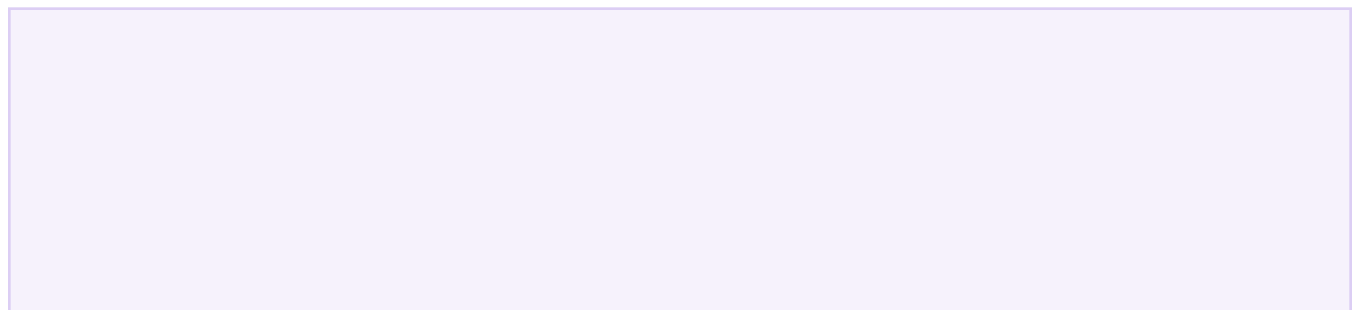
A small data dictionary and explicit rules for comparison, aggregation and unresolved evidence.

Practice context: People and attendance are different units. Some member returns and language reviews are incomplete.

Define unit, period, population, method and source for two measures.



Map one local field to a shared definition. What cannot be combined, and why?



Self-check: Could two colleagues apply your definitions to the same evidence and explain any remaining disagreement?

5. Govern and test

An access and responsibility plan, a member-facing result, and a pilot checklist for the complete workflow.

Practice context: The representative, invited contributor, central reviewer and member reader need different views.

For each role: population | records | allowed actions | sharing limits | owner



Write the member summary: approved findings, unresolved issues and next action.



Self-check: Can another person run the cycle with your plan, and can a contributor explain the value of the result?

Test the complete workflow

Use fictional records first, then agree a small authorized pilot with the responsible people.

- ☐ A contributor can submit the intended information.
- ☐ An unrelated member cannot access restricted records.
- ☐ A correction preserves the original and its reason.
- ☐ A reviewer can trace a finding to its source and definition.
- ☐ A member receives useful findings and a clear next action.

Expected vs actual behavior: record gaps and the person responsible.

What will change before the next cycle? Include the next review point.