Connect training to useful evidence

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

Use fictional Bridge learner L-18 first. Then adapt the plan to one training program. Connect baseline, practice assignments, feedback and later application while keeping satisfaction, learning and financial claims distinct.

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 training evaluation question and one workflow to test

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

1. Plan the evidence

A collection map that separates attendance, learning and later use of a skill.

Practice context: L-18 practices project handoffs, then attempts one in real work.

Map baseline, practice, course-end and later use: source | owner | timing | access

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

Self-check: Can a colleague explain which source answers each evaluation question?

2. Review the evidence

A review sheet connecting each judgment to a criterion, source passage and next teaching action.

Practice context: The assignment names a task, owner and deadline but no escalation path.

For each criterion: source passage | judgment | uncertainty | feedback

How will two reviewers resolve disagreement?

Self-check: Could the learner or another reviewer challenge a judgment using the same source?

3. Connect the journey

A comparison plan with stable records, visible rater changes and honest coverage.

Practice context: Ten learners have baseline evidence; six have comparable follow-up; one manager changed.

Map participant, client, cohort, episode, date and rater role.

Identify usable pairs, missing observations and changed raters.

Self-check: Would a reader understand exactly whose evidence supports the reported change?

4. Define the results

A measurement dictionary and a clear boundary between learning, application and financial claims.

Practice context: Satisfaction, demonstrated skill and later application answer different questions.

Define two results: population | method | unit | timing | interpretation

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

Self-check: Can a client distinguish what was measured from what is still an assumption?

5. Govern and return findings

Separate learner and client reporting views, plus a tested plan for access and corrections.

Practice context: Client A needs its agreed results, not Client B records or private coaching notes.

Sketch learner and client views, including source and export access.

Assign owners for correction, approval and the next collection.

Self-check: Can each reader get useful evidence while the agreed boundaries hold?

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.
- [ ] Client A cannot access Client B records.
- [ ] A correction preserves the original and its reason.
- [ ] A reviewer can trace a finding to its source and definition.
- [ ] The learner and client receive appropriate, useful findings.

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

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