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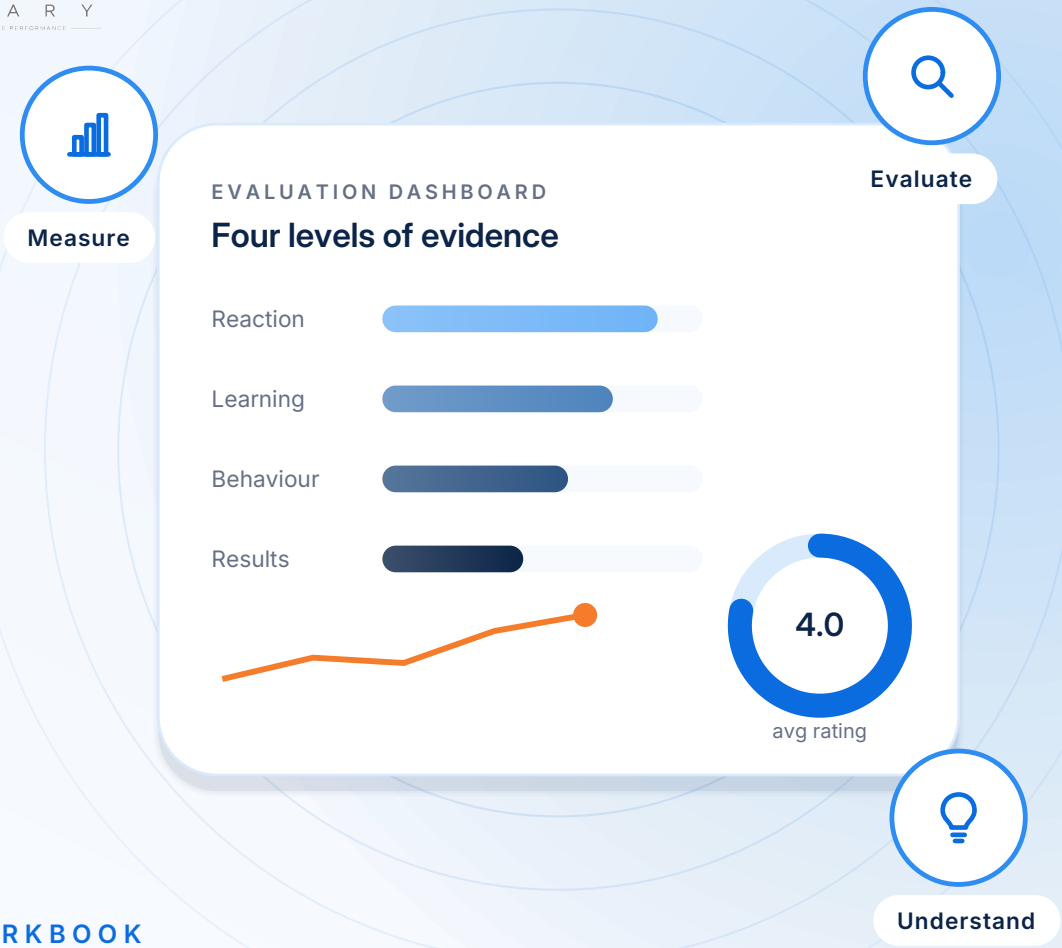

A PRACTICAL WORKBOOK

Training Evaluation Starter Kit.

A Practical Workbook for Corporate Trainers, HR Professionals, L&D Teams and Training Consultants

Measure the Learning.
Evaluate the Application.
Understand the Impact.

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PART I

Foundations of Training Evaluation

5 sections

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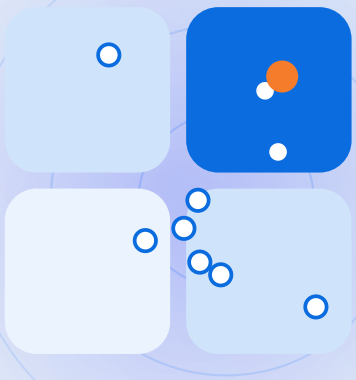
01

SECTION

PART I · 1 OF 5

Welcome to the Training Evaluation Starter Kit



Training is an investment of time, money and organisational attention.

Employees leave their regular responsibilities to attend programmes. Trainers invest time in preparation and delivery. Managers arrange schedules and resources. Organisations expect the learning experience to improve capability and contribute to workplace performance.

But how do we know whether the investment has achieved its purpose?

Attendance does not prove learning.

Positive feedback does not prove that employees acquired new skills.

Improved test scores do not automatically prove that employees will apply those skills at work.

And an improvement in business results does not necessarily mean that training caused the improvement.

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WHAT EACH KIND OF EVIDENCE DOES NOT PROVE

Attendance
✕ does not automatically prove **learning**

Positive feedback
✕ does not automatically prove **skills acquired**

Improved test scores
✕ does not automatically prove **application at work**

Better business results
✕ does not automatically prove **training caused it**

Training evaluation helps organisations examine these questions systematically.

It involves collecting and interpreting evidence about the learning experience, learning achievement, workplace application and relevant organisational outcomes.

The purpose is not merely to produce a feedback report after a programme. It is to understand what worked, what did not, what changed and what should happen next.

This workbook provides practical tools to help you plan and conduct training evaluation throughout the learning cycle.

It is designed for:

- Corporate trainers and facilitators.
- Training and development professionals.
- Human Resources teams.
- Learning and Development managers.

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- Training consultants.
- Department heads and line managers.
- Internal academies and training centres.
- Professionals responsible for learning effectiveness.

What This Workbook Will Help You Do

By using this resource, you will be able to:

- Define what a training programme is expected to achieve.
- Select appropriate evaluation methods.
- Design participant feedback forms.
- Assess learning through knowledge checks and practical demonstrations.
- Monitor workplace application.
- Gather evidence from managers and employees.
- Compare performance before and after training.
- Interpret evaluation results responsibly.
- Prepare clear reports for stakeholders.
- Identify improvements for future programmes.

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The Central Principle

NOTE

Do not wait until training is over to decide what success should look like.

Effective evaluation begins when the training need is defined and continues through design, delivery, application and review.

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02

SECTION
PART I · 2 OF 5

Why Training Evaluation Matters



Training evaluation provides a structured way to determine whether a learning intervention has met its intended objectives and what should be improved.

Without evaluation, organisations may know how many people attended a programme but remain uncertain about what those participants learned or applied.

2.1 Benefits for Trainers

Evaluation helps trainers:

- Identify which learning activities are effective.
- Understand where participants struggle.
- Improve content and facilitation.
- Check whether learning objectives have been achieved.

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- Identify gaps requiring additional practice.
- Make evidence-informed changes to future programmes.

2.2 Benefits for Participants

Evaluation can help participants:

- Understand their learning progress.
- Recognise strengths and development needs.
- Receive feedback on their performance.
- Identify opportunities to practise new skills.

- Connect learning to real workplace challenges.

2.3 Benefits for Managers

Evaluation gives managers information about:

- The capabilities employees have developed.
- Whether new skills are being applied.
- What support employees need.
- Which workplace barriers affect performance.
- Whether further coaching or development is required.

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2.4 Benefits for Organisations

Evaluation supports decisions about:

- Programme effectiveness.
- Learning investment.
- Future training priorities.
- Workforce capability.
- Workplace performance improvement.
- Programme redesign, continuation or discontinuation.

2.5 What Evaluation Cannot Automatically Prove

Evaluation is useful only when conclusions match the strength of the evidence.

A participant may enjoy a programme without learning much.

A participant may perform well on a test but struggle to apply the skill at work.

A business metric may improve after training because of several simultaneous changes, including new processes, better technology, different staffing or changing market conditions.

For this reason, evaluation should distinguish between:

- What participants experienced.
- What participants learned.

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- What participants applied.
- What workplace results changed.
- What contribution training plausibly made to those results.

Reflection Exercise

Think about a training programme you have delivered or attended.

What was the programme intended to achieve?

What evidence was collected afterwards?

What did that evidence actually demonstrate?

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What remained unknown?

What would you measure differently next time?

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03

SECTION

PART I · 3 OF 5

Understanding the Four Levels of Evaluation



One widely used framework for organising training evaluation is the four-level model associated with Donald Kirkpatrick.

The model provides a useful structure for examining participant reactions, learning, workplace behaviour and results.

These levels address different questions. They should not be treated as automatic proof that one level causes the next.

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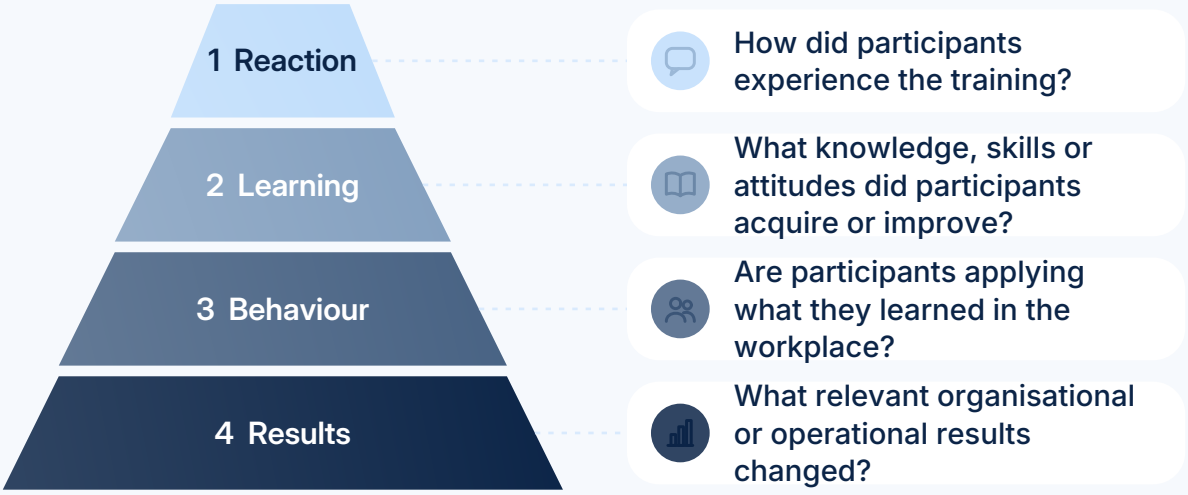
FOUR LEVELS, FOUR DIFFERENT QUESTIONS



Level 1: Reaction

Core question: How did participants experience the training?

This level examines participants' perceptions of relevance, clarity, facilitation, learning activities and usefulness.

Possible evidence includes:

- Participant feedback forms.
- Relevance ratings.
- Comments about learning activities.
- Perceived confidence.
- Feedback on the learning environment.

Reaction data helps improve programme design, but positive reactions alone do not establish learning or business impact.

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Level 2: Learning

Core question: What knowledge, skills or attitudes did participants acquire or improve?

Possible evidence includes:

- Pre- and post-training assessments.
- Knowledge checks.
- Practical demonstrations.
- Scenario-based assessments.
- Skills tests.
- Structured observation.

Assessment should match the learning objective. If the objective is to demonstrate a skill, a multiple-choice test alone may not provide sufficient evidence.

Level 3: Behaviour

Core question: Are participants applying what they learned in the workplace?

Possible evidence includes:

- Manager observation.
- Work samples.
- Behavioural checklists.
- Follow-up interviews.

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- Quality reviews.
- Workplace application logs.

Application depends on more than individual capability. Employees also need opportunities, resources, support and appropriate working conditions.

Level 4: Results

Core question: What relevant organisational or operational results changed?

Possible evidence includes:

- Quality and accuracy.
- Productivity.
- Sales conversion.
- Customer satisfaction.
- Error and rework rates.
- Compliance performance.
- Service response times.
- Other measures connected to the original business need.

Results are often influenced by factors beyond training. Any claim about training's contribution should consider these other influences.

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The Four-Level Evaluation Matrix

LEVEL	FOCUS	EXAMPLE QUESTION	EXAMPLE EVIDENCE
1. Reaction	Learning experience	Was the programme relevant to participants' work?	Participant questionnaire
2. Learning	Knowledge and skills	Can participants demonstrate the required capability?	Assessment or practical demonstration
3. Behaviour	Workplace application	Are participants applying the capability at work?	Manager observation or work sample
4. Results	Business outcomes	Did the relevant performance measure improve?	Operational or business data

Evaluation Planning Worksheet

Programme name

Level 1: Reaction: What will we ask?

Level 2: Learning: What will participants demonstrate?

Level 3: Behaviour: What should change at work?

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Level 4: Results: What business measure may be affected?

Which measures are essential for this programme?

What evidence is realistically available?

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04

SECTION

PART I · 4 OF 5

Training Evaluation vs. Training Effectiveness



Training evaluation is the process of collecting and interpreting evidence.

Training effectiveness concerns the extent to which the training achieves its intended learning and performance objectives.

The two are closely connected, but they are not identical.

A well-designed evaluation can reveal that a programme was ineffective. That does not mean the evaluation failed. It means the evaluation helped identify a problem that needs attention.

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4.1 Understand the Difference

QUESTION	WHAT IT EXAMINES
Was the programme delivered as planned?	Delivery quality and implementation
Did participants find the programme relevant?	Participant experience
Did participants learn?	Learning achievement
Did participants apply the learning?	Workplace transfer
Did performance improve?	Changes in relevant performance measures
Did training contribute to the improvement?	The plausible contribution of learning relative to other factors

4.2 The Evaluation Chain

A useful way to organise evaluation is to connect the original need to the evidence collected.

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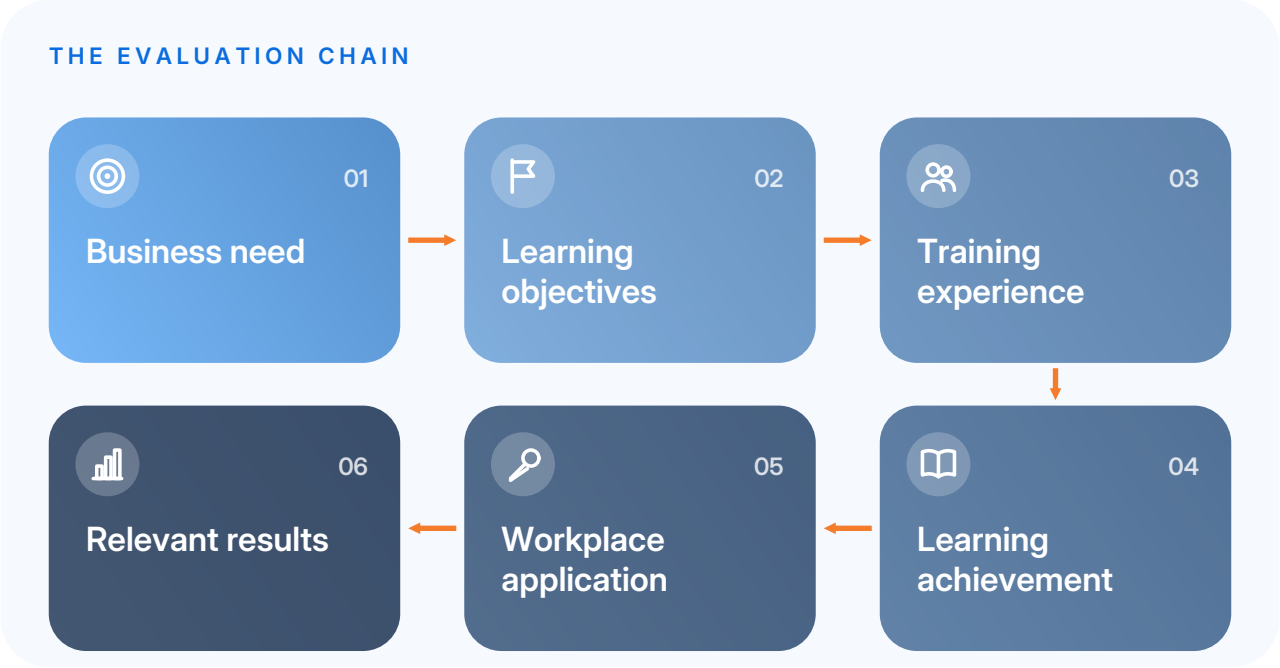

Each connection should be explicit.

For example, if the business need is to reduce customer service errors, the evaluation should not stop at whether participants enjoyed a communication workshop.

It should examine whether participants learned the required communication techniques, applied them in customer interactions and contributed to a measurable improvement in relevant service quality.

4.3 Evaluation Questions Must Match the Objective

LEARNING OBJECTIVE	APPROPRIATE EVIDENCE
Identify key safety procedures	Knowledge assessment
Operate a system correctly	Practical demonstration

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LEARNING OBJECTIVE	APPROPRIATE EVIDENCE
Conduct an effective feedback conversation	Role-play assessed against behavioural criteria
Apply a structured problem-solving method	Case exercise or work sample
Improve workplace documentation accuracy	Review of completed documents
Improve customer complaint resolution	Case records, quality reviews and relevant service measures

Practical Exercise

Choose one training programme.

Programme

Original business need

One learning objective

Evidence that would demonstrate learning

Evidence that would demonstrate workplace application:

Relevant performance result

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Other factors that could affect the result

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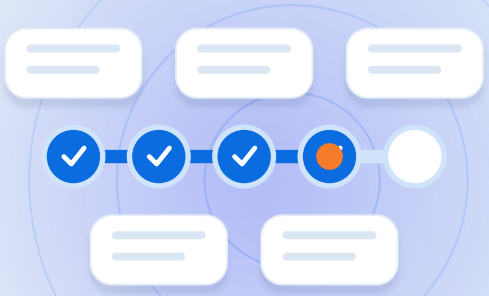
SECTION

PART I · 5 OF 5

Planning Evaluation Before Training Begins



Evaluation is most useful when it is built into the programme design rather than added at the end.

Before delivery, establish what the programme should achieve, how success will be assessed and who will provide the evidence.

5.1 Define the Intended Outcome

Start with the performance or capability requirement.

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Ask:

01 What problem is the programme intended to address?

02 Which employees need to improve?

03 What must participants know or be able to do?

04 What workplace behaviour should change?

05 What performance measure may be affected?

5.2 Establish a Baseline

A baseline describes the starting point against which future results can be compared.

Depending on the programme, it may include:

- Existing knowledge scores.
- Current practical skill levels.
- Observed workplace behaviours.
- Quality or error rates.
- Productivity or service measures.
- Manager assessments.
- Other relevant performance data.

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A baseline is not always available. If it cannot be established, document that limitation rather than inventing a starting value.

5.3 Define Success Criteria

Specify what acceptable improvement would look like.

Examples:

- Participants correctly identify the required procedures in an assessment.
- Participants demonstrate the target skill against an agreed checklist.
- Managers observe specified behaviours during follow-up.
- A relevant quality measure improves against an agreed baseline.
- Employees complete a workplace application task to the required standard.

Targets should be realistic, relevant and agreed with the responsible stakeholders.

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5.4 Assign Evaluation Responsibilities

Clarify who will:

- Design assessments.
- Collect participant feedback.
- Review learning results.
- Observe workplace application.
- Supply business performance data.
- Analyse findings.

- Approve recommendations.
- Implement improvement actions.

5.5 Plan the Follow-Up



Some evidence can be collected immediately after training. Other evidence requires time for employees to apply their learning.

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The follow-up interval should reflect the type of skill, frequency of use and opportunity to practise.

For example, a knowledge assessment may be appropriate at the end of a workshop. A review of managerial behaviour may require several weeks of workplace application.

Evaluation Planning Checklist

- [ ] The business need is defined.
- [ ] The intended learning outcomes are documented.
- [ ] Each objective has a suitable assessment method.
- [ ] Baseline information has been identified where feasible.
- [ ] Success criteria are documented.
- [ ] Evaluation responsibilities are assigned.
- [ ] Data sources and access arrangements are confirmed.
- [ ] Follow-up timing is realistic.
- [ ] Participant and employee privacy requirements are considered.
- [ ] Findings will inform a defined decision or improvement action.

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PART II

Designing Your Evaluation

5 sections

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7 Map Learning Objectives to Evaluation Methods p. 33

8 Establish Baselines and Success Criteria p. 36

9 Select Evaluation Methods and Data Sources p. 42

10 Build a Training Evaluation Plan p. 45

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SECTION
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Define the Purpose of Evaluation



Before selecting a questionnaire or assessment, clarify the decision the evaluation needs to support.

Different evaluation purposes require different methods.

6.1 Common Evaluation Purposes

Programme improvement

Identify what should be retained, changed, simplified or expanded in the learning design.

Learning verification

Determine whether participants achieved the intended knowledge or skill outcomes.

Workplace application

Understand whether participants are using the learning in relevant work situations.

Business performance review

Examine changes in measures associated with the original business need.

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Investment decisions

Provide evidence to help stakeholders decide whether to continue, adapt, expand or discontinue an intervention.

Compliance verification

Determine whether participants have demonstrated required knowledge or competence according to applicable standards.

Compliance evaluation may have mandatory requirements that take precedence over a general feedback approach.

6.2 Evaluation Purpose Worksheet

Programme name

Why is this evaluation being conducted?

- [ ] Improve programme design.
- [ ] Verify learning achievement.
- [ ] Review workplace application.
- [ ] Examine business performance.
- [ ] Support an investment decision.
- [ ] Meet a compliance requirement.
- [ ] Other: _____

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What decision will the evaluation support?

Who will use the findings?

What information do they need?

What evidence will be sufficient for the decision?

What limitations should be acknowledged?

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07

SECTION
PART II · 2 OF 5

Map Learning Objectives to Evaluation Methods



Every learning objective should have a corresponding way to determine whether it has been achieved.

A mismatch between the objective and the assessment can produce misleading results.

For example, asking participants whether they feel confident about negotiation does not establish that they can negotiate effectively.

7.1 Objective-to-Evaluation Mapping

LEARNING OBJECTIVE	SUITABLE EVALUATION METHOD	EVIDENCE OF ACHIEVEMENT
Explain a concept	Knowledge test or structured explanation	Accurate explanation

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LEARNING OBJECTIVE	SUITABLE EVALUATION METHOD	EVIDENCE OF ACHIEVEMENT
Identify a problem	Case analysis	Correct identification supported by reasoning
Perform a task	Practical demonstration	Task completed to the required standard
Communicate effectively	Role-play or observed interaction	Observable communication behaviours
Make a decision	Scenario exercise	Decision supported by relevant evidence and judgement
Apply a process	Work sample or simulation	Process followed correctly
Coach an employee	Observed coaching conversation	Appropriate questions, listening and agreed actions

7.2 Learning Objective Mapping Worksheet

Programme

Target audience

LEARNING OBJECTIVE	REQUIRED EVIDENCE	ASSESSMENT METHOD	SUCCESS CRITERION
Objective 1			

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LEARNING OBJECTIVE	REQUIRED EVIDENCE	ASSESSMENT METHOD	SUCCESS CRITERION
Objective 2			
Objective 3			
Objective 4			
Objective 5			

7.3 Choosing the Right Assessment

Consider these questions:

01 Does the assessment measure the intended objective?

02 Is the task similar enough to the required workplace performance?

03 Are the scoring criteria clear?

01 Can different assessors apply the criteria consistently?

02 Is the assessment accessible to participants?

03 Is the difficulty appropriate to the expected proficiency level?

04 Does the assessment provide enough evidence for the decision?

A short knowledge test may be sufficient for basic factual knowledge. A practical skill or safety-critical task may require a demonstration against specified criteria.

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SECTION
PART II · 3 OF 5

Establish Baselines and Success Criteria



A meaningful evaluation compares evidence against a defined reference point or standard.

Without a baseline, an organisation may know the current result but not whether it represents an improvement.

8.1 Common Baseline Types

Knowledge baseline

A pre-training test or existing assessment of relevant knowledge.

Skill baseline

A practical demonstration, work sample or structured observation.

Behaviour baseline

An observation of current workplace behaviour using defined indicators.

Performance baseline

An existing business or operational measure collected over a specified period.

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Perception baseline

A structured measure of confidence, perceived capability or reported barriers.

Different baseline types answer different questions. A confidence rating should not be treated as equivalent to demonstrated competence.

8.2 Baseline Worksheet

Programme or intervention	
Business need	
Measure to be evaluated	
Definition of the measure	
Baseline value or finding	
Baseline period	
Data source	
Number of participants or observations	
Limitations of the baseline	

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Required or desired standard	
Target review date	

8.3 Defining Success Criteria

Success criteria describe the evidence that will indicate satisfactory achievement.

Weak criterion:

> "Participants will improve their communication."

Stronger criterion:

> "Participants will demonstrate active listening, clarification and summarising behaviours during a simulated customer conversation, meeting the agreed standard on the assessment checklist."

Success Criteria Worksheet

Learning objective or business outcome	
What must participants demonstrate?	

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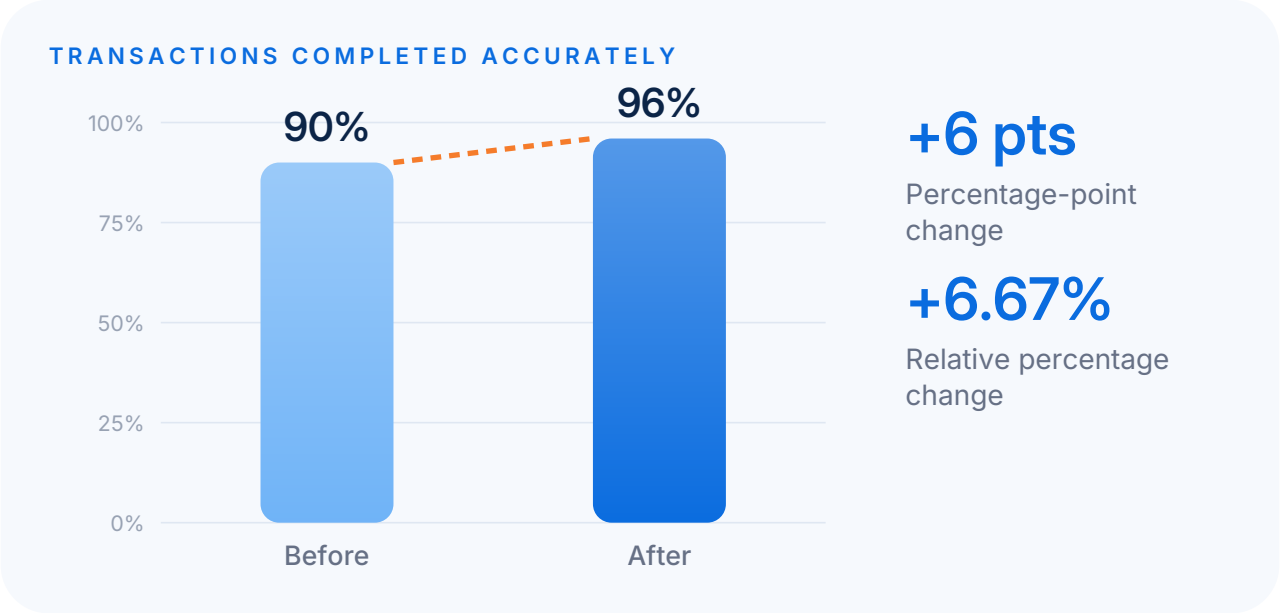
What standard must they meet?	
How will the standard be assessed?	
Who will assess it?	
When will it be assessed?	
What will happen if the standard is not met?	

8.4 Percentage Change and Percentage-Point Change



Use the correct calculation when reporting numerical results.

Suppose the proportion of transactions completed accurately increases from 90% to 96%.

The improvement is **6 percentage points** .

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The relative percentage increase is:

CALCULATION

$$(96 - 90) \div 90 \times 100 = 6.67\%$$

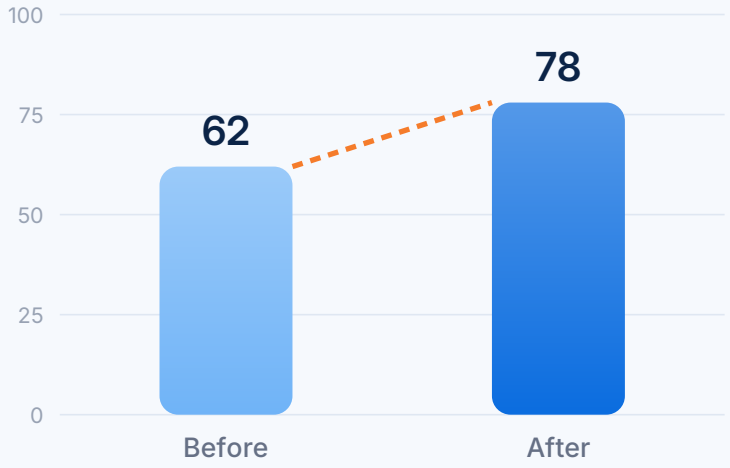
These describe different things.

Percentage-point change is usually clearer when comparing two percentages. Relative percentage change describes the change in relation to the original value.

Always state the underlying measure and period.

8.5 Pre- and Post-Assessment Comparison

AVERAGE KNOWLEDGE SCORE (OUT OF 100)



+16

Point increase on the assessment

62 → 78

Comparable tests required

Suppose the average knowledge score changes from 62 out of 100 before training to 78 out of 100 afterwards.

The score increases by 16 points.

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That indicates improvement on the assessment, provided the tests are sufficiently comparable. It does not automatically prove workplace application or business impact.

My programme's baseline and target

Baseline	
Target	
Measurement method	
Interpretation limitations	

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SECTION
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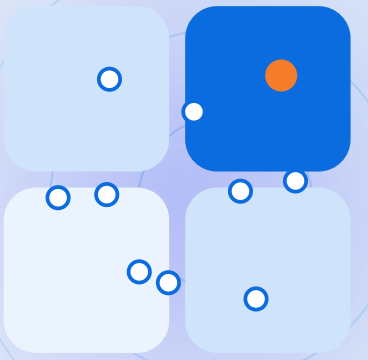
Select Evaluation Methods and Data Sources



Evaluation methods should match the question, available evidence, risk level and resources.

Using more methods is not automatically better. The objective is to gather enough relevant evidence to support a responsible conclusion.

9.1 Evaluation Method Selector

METHOD	USEFUL FOR	CONSIDERATIONS
Participant questionnaire	Reactions, perceived relevance and suggestions	Self-reported perceptions may not reflect actual learning
Knowledge assessment	Factual and conceptual learning	Must align with objectives and appropriate difficulty
Practical demonstration	Skills and task performance	Requires clear criteria and suitable assessment conditions

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METHOD	USEFUL FOR	CONSIDERATIONS
Scenario assessment	Decision-making and applied understanding	Scenario quality affects what can be inferred
Trainer observation	Participant engagement and demonstrated practice	Observations may be influenced by assessor judgement
Manager questionnaire	Reported workplace application	Managers may have limited opportunity to observe behaviour
Employee interview	Experience, barriers and application	Responses depend on question quality and willingness to share
Work sample review	Quality of actual outputs	Samples must be relevant and representative
Business performance data	Operational or organisational outcomes	Other factors may influence changes
Follow-up observation	Workplace behaviour over time	Requires access and appropriate timing



9.2 Data Source Planning Worksheet

EVALUATION QUESTION	DATA REQUIRED	SOURCE	COLLECTION METHOD	OWNER
Was the programme relevant?				
Was learning achieved?				

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EVALUATION QUESTION	DATA REQUIRED	SOURCE	COLLECTION METHOD	OWNER
Was learning applied?				
Did performance change?				
What should improve?				

9.3 Use Multiple Sources When Appropriate

For important decisions, consider whether different sources can confirm or challenge the same conclusion.

For example, if a programme aims to improve delegation:

- Participants can complete a knowledge or scenario assessment.
- Managers can observe delegation conversations.
- Employees can provide feedback about clarity of ownership.
- Work records can show whether responsibilities and deadlines were documented appropriately.

When these sources tell different stories, investigate the differences rather than averaging them into a single score.

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SECTION
PART II · 5 OF 5

Build a Training Evaluation Plan



An evaluation plan brings the objectives, methods, responsibilities and timelines together.

It provides a practical reference before, during and after the programme.

Master Evaluation Plan

Programme name	
Business owner	
Training provider or facilitator	
Target audience	
Delivery date or period	

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EVALUATION ACROSS THE PROGRAMME



EVALUATION STAGE	EVALUATION ACTIVITY	DATA REQUIRED	RESPONSIBLE PERSON	TIMING
Before training	Baseline review			
During training	Learning observation			
Immediately after	Participant feedback			
Immediately after	Learning assessment			
After workplace application	Behaviour review			
Later follow-up	Performance review			
Final review	Evaluation report			

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Evaluation Governance

Who approves the evaluation design?

Who owns the performance outcome?

Who provides access to the relevant data?

How will participant information be protected?

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Who will receive the findings?

What decisions will follow the report?

When will the evaluation plan be reviewed?

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PART III

Ready-to-Use Evaluation Templates

8 sections

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SECTION
PART III · 1 OF 8

Participant Training Feedback Questionnaire



Purpose

This questionnaire gathers participant feedback about the learning experience, relevance, facilitation and opportunities to practise.

It should be completed in a way that encourages honest responses.

Do not treat satisfaction scores as direct proof of learning achievement or business impact.

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Participant Instructions

Please rate the statements based on your experience of the programme.

Use the following scale:

RATING SCALE

1	2	3	4	5	N/A
Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Not applicable

Section A: Programme Relevance

	STATEMENT	1	2	3	4	5	N/A
01	The programme objectives were clear.	○	○	○	○	○	○
02	The content was relevant to my role.	○	○	○	○	○	○
03	The programme addressed useful workplace challenges.	○	○	○	○	○	○
04	The examples reflected situations I may encounter.	○	○	○	○	○	○
05	The learning activities supported the objectives.	○	○	○	○	○	○
06	The level of difficulty was appropriate.	○	○	○	○	○	○

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Section B: Content and Learning Design

	STATEMENT	1	2	3	4	5	N/A
01	The content was organised logically.	○	○	○	○	○	○
02	The key concepts were explained clearly.	○	○	○	○	○	○
03	The activities provided useful opportunities to practise.	○	○	○	○	○	○
04	The learning materials were useful.	○	○	○	○	○	○
05	The pace allowed me to follow the content.	○	○	○	○	○	○
06	The programme provided sufficient opportunities for questions.	○	○	○	○	○	○

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Section C: Facilitation

	STATEMENT	1	2	3	4	5	N/A
01	The facilitator explained concepts clearly.	○	○	○	○	○	○
02	The facilitator encouraged relevant participation.	○	○	○	○	○	○
03	The facilitator responded appropriately to questions.	○	○	○	○	○	○
04	The facilitator managed time effectively.	○	○	○	○	○	○
05	Feedback on activities was useful.	○	○	○	○	○	○
06	The facilitator treated participants respectfully.	○	○	○	○	○	○

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Section D: Learning Confidence and Application

	STATEMENT	1	2	3	4	5	N/A
01	I can identify the key concepts covered.	○	○	○	○	○	○
02	I understand how the learning relates to my work.	○	○	○	○	○	○
03	I know which skills or behaviours I need to practise.	○	○	○	○	○	○
04	I can identify opportunities to apply the learning.	○	○	○	○	○	○
05	I understand what support may be needed for application.	○	○	○	○	○	○

NOTE

These items measure participant perceptions. Use a suitable assessment to verify actual learning achievement.

Section E: Open-Ended Questions

1 **What was the most useful part of the programme?**

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2 **What could be improved?**

3 **Which concept or skill will you apply first?**

4 **What might prevent you from applying the learning?**

5 **What additional support or resources would help you?**

6 **What topic requires further explanation or practice?**

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Programme Information

Programme title

Date

Delivery mode:

- [ ] Classroom
- [ ] Virtual instructor-led
- [ ] Blended
- [ ] Self-paced
- [ ] Other: _____

Department or participant group, if relevant

Thank You

Thank you for providing feedback. Your responses will help identify opportunities to improve the learning experience and support better application in the workplace.

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SECTION
PART III · 2 OF 8

Learning Assessment and Knowledge Check



Purpose

This template evaluates whether participants have acquired the knowledge or understanding specified in the learning objectives.

The questions should be designed around the programme content and the standard participants are expected to achieve.

Assessment Information

Programme	
Participant identifier	
Assessment date	

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Assessment stage:

- [ ] Before training
- [ ] During training
- [ ] After training
- [ ] Follow-up

Learning objectives assessed

Assessment Blueprint

OBJECTIVE	QUESTION OR TASK	QUESTION TYPE	MARKS AVAILABLE
Objective 1			
Objective 2			
Objective 3			
Objective 4			
Objective 5			

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Sample Question Formats

Multiple-choice question

Which response best demonstrates effective delegation?

A. Assigning a task without explaining the expected result.

B. Explaining the outcome, authority, resources and review arrangements.

C. Keeping all decisions with the manager while making the employee responsible for delivery.

D. Checking every action without clarifying the employee's responsibility.

Correct answer: B.

Short-answer question

Explain two ways a manager can verify whether a training need is genuine.

Participant response:

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Scenario-based question

An employee understands a procedure but cannot complete it accurately because the system instructions are outdated.

What should the manager investigate before recommending additional training?

Participant response:

Knowledge Assessment Score Sheet

Total marks available	
Marks achieved	

FORMULA

Assessment Score = Marks Achieved ÷ Total Marks Available × 100

Score (%)	
Required standard (%)	

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Result:

- [ ] Standard achieved
- [ ] Further development required
- [ ] Assessment incomplete

Assessor Comments

Demonstrated strengths	
Knowledge gaps	
Recommended support	

Reassessment required?

- [ ] Yes
- [ ] No

Reassessment date, if applicable	

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Assessment Quality Checklist

- [ ] Questions align with learning objectives.
- [ ] Instructions are clear.
- [ ] The difficulty is appropriate.
- [ ] Scoring criteria are documented.
- [ ] Correct answers or expected responses are available to assessors.
- [ ] Accessibility requirements have been considered.
- [ ] Assessment results will be handled appropriately.
- [ ] Any reassessment process is documented.

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PART III · 3 OF 8

Practical Skills Assessment Checklist



Purpose

Use this form when learning objectives require participants to demonstrate practical capability.

The assessor should observe the participant performing a relevant task or realistic simulation and compare the performance with defined criteria.

Assessment Details

Programme	
Skill being assessed	
Participant	

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Assessor	
Date	

Assessment environment:

- [ ] Workplace
- [ ] Simulation
- [ ] Role-play
- [ ] Practical exercise
- [ ] Other: _____

Performance Criteria

Use the following scale:

RATING SCALE

0	Not demonstrated
1	Partially demonstrated
2	Demonstrated to the required standard
N/O	Not observed

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CRITERION	SCORE	EVIDENCE OR NOTES
Understands the task and objective		
Prepares appropriately		
Follows required steps		
Uses relevant information or tools correctly		
Applies the required skill		
Handles routine difficulties		
Communicates appropriately		
Checks the quality of the outcome		
Completes required documentation		
Follows applicable safety or compliance requirements		

Adapt the criteria to the task. Remove irrelevant items and add any mandatory performance requirements.

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Critical Criteria

Some tasks have mandatory criteria that must be met regardless of the overall score.

Critical criterion 1	
Met?	☐ Yes ☐ No ☐ Not observed
Critical criterion 2	
Met?	☐ Yes ☐ No ☐ Not observed
Critical criterion 3	
Met?	☐ Yes ☐ No ☐ Not observed

Assessment Result

Total score, where applicable	
Required standard	

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Result:

- [ ] Meets the required standard
- [ ] Partially meets the standard
- [ ] Does not yet meet the standard
- [ ] Further assessment required

NOTE

A simple total should not override a missed critical requirement. Use the organisation's approved assessment rules for safety-critical, regulated or formally certified tasks.

Assessor Feedback

What was performed effectively?	
What needs improvement?	
Recommended practice or support	
Reassessment or follow-up date	
Assessor signature or confirmation	

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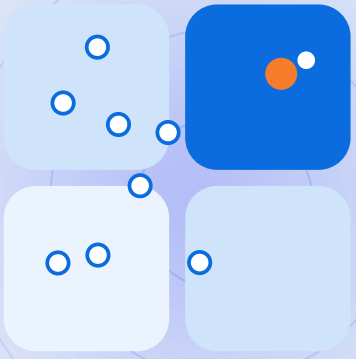
SECTION
PART III · 4 OF 8

Trainer Observation Form



Purpose

This form helps the facilitator record evidence of learning, participation, practice and difficulties during the programme.

It supports instructional decisions and can inform future programme improvement.

It should not be treated as a complete measure of participant competence unless the observation criteria and assessment conditions support that conclusion.

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Session Details

Programme	
Session or module	
Date	
Trainer or observer	
Learning objectives	

Observation Areas

OBSERVATION AREA	EVIDENCE OR NOTES
Understanding of key concepts	
Quality of participant questions	
Ability to apply concepts to examples	
Participation in relevant activities	
Practical skill demonstration	
Common misunderstandings	
Areas requiring additional practice	

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OBSERVATION AREA	EVIDENCE OR NOTES
Learning activities that worked well	
Timing or pacing issues	
Content requiring clarification	

Participant or Group Observations

What did participants demonstrate effectively?

Which concepts appeared difficult?

What misconceptions were observed?

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Which activities provided the strongest evidence of learning?

What should be adjusted in the next session?

Immediate Instructional Actions

- [ ] Re-explain a key concept.
- [ ] Provide an additional example.
- [ ] Conduct another practice activity.
- [ ] Give individual feedback.
- [ ] Adjust the pace.
- [ ] Provide a reference resource.
- [ ] Record an issue for programme redesign.

Additional action

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Trainer Reflection

What worked well in my facilitation?

What should I improve?

What evidence supports that conclusion?

What will I change in the next delivery?

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SECTION
PART III · 5 OF 8

Manager Follow-Up Questionnaire



Purpose

This questionnaire gathers manager observations about whether participants are applying the learning in their work.

It should be sent only after participants have had a reasonable opportunity to use the relevant skills.

Manager Instructions

Please answer based on your observations of the employee's work since the training programme.

If you have not had sufficient opportunity to observe the relevant behaviour, select “Not enough evidence” rather than guessing.

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Programme and Employee Information

Programme	
Employee or group	
Manager	
Follow-up date	
Period observed	

Section A: Opportunity to Apply

1. Has the employee had opportunities to use the learning?

- [ ] Frequently
- [ ] Sometimes
- [ ] Rarely
- [ ] Not yet
- [ ] Not sure

2 Which work activities provided those opportunities?

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3 **What conditions or resources affected application?**

Section B: Behavioural Application

Use the scale:

RATING SCALE

1	Not demonstrated
2	Demonstrated inconsistently
3	Demonstrated to the expected standard in some relevant situations
4	Demonstrated consistently in observed situations
5	Demonstrated effectively across a range of relevant situations
NE	Not enough evidence

STATEMENT	1	2	3	4	5	NE
01 Applies the relevant knowledge correctly	○	○	○	○	○	○
02 Uses the target skill in appropriate work situations	○	○	○	○	○	○
03 Follows the agreed process	○	○	○	○	○	○

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	STATEMENT	1	2	3	4	5	NE
04	Demonstrates the expected behaviour	○	○	○	○	○	○
05	Handles routine challenges appropriately	○	○	○	○	○	○
06	Seeks support when necessary	○	○	○	○	○	○
07	Applies feedback to improve performance	○	○	○	○	○	○
08	Demonstrates greater independence where expected	○	○	○	○	○	○

Adapt the statements to the programme's learning objectives.

Section C: Observed Improvement

4 **What changes have you observed since training?**

5 **What evidence supports your assessment?**

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6 **Which behaviours still require improvement?**

7 **What workplace barriers affect application?**

8 **What additional support would help?**

Section D: Overall Assessment

Has the employee demonstrated the intended workplace behaviour?

- [ ] Yes, consistently in observed situations.
- [ ] Partly.
- [ ] Not yet.
- [ ] Not enough evidence.

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What should happen next?

- [ ] Continue normal workplace practice.
- [ ] Provide additional coaching.
- [ ] Arrange further learning or practice.
- [ ] Remove a workplace barrier.
- [ ] Clarify expectations.
- [ ] Conduct another review.

Additional comments:

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SECTION
PART III · 6 OF 8

Workplace Application Assessment



Purpose

This assessment helps determine whether the participant is using the capability developed through training.

It can be completed by the employee, manager, coach or assessor, depending on the behaviour being evaluated.

Assessment Details

Programme	
Target behaviour or skill	
Employee or group	

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Workplace application period

Assessment method:

- ☐ Direct observation
- ☐ Work sample
- ☐ Structured interview
- ☐ Manager review
- ☐ Employee reflection
- ☐ Performance data
- ☐ Other: _____

Workplace Application Checklist

INDICATOR	DEMONSTRATED?	EVIDENCE
Uses the intended skill in a relevant situation		
Follows the required method or process		
Adapts the skill appropriately to the situation		
Produces work meeting the expected standard		

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INDICATOR	DEMONSTRATED?	EVIDENCE
Responds constructively to feedback		
Uses available resources appropriately		
Demonstrates consistency over time		
Applies the learning independently where expected		

Application Evidence

Describe a specific work situation in which the learning was applied.

What did the employee do?

What was the result?

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What evidence supports the result?

What helped the employee apply the learning?

What made application difficult?

What should happen next?

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Application Status

- [ ] Learning is being applied effectively.
- [ ] Learning is being applied inconsistently.
- [ ] Learning has not yet been applied.
- [ ] There has not been a suitable opportunity to apply it.
- [ ] More evidence is required.

Follow-Up Action

Action	
Owner	
Target date	
Evidence to review	

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PART III · 7 OF 8

Training Transfer Interview Guide



Purpose

This interview explores why learning is or is not being applied in the workplace.

It can be used with participants and managers to identify practical enablers and barriers.

Participant Interview Questions

01 Which part of the training have you used in your work?

02 Can you describe a specific situation in which you applied the learning?

03 What worked well?

04 What was difficult to apply?

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05 Which skills do you still need to practise?

06 Did the training prepare you for the situations you encountered?

07 What tools, resources or guidance would help?

08 What feedback have you received from others?

09 What would help you apply the learning more consistently?

Manager Interview Questions

01 What workplace behaviours were expected to change after the programme?

02 What changes have you observed?

01 What evidence supports those observations?

02 Have employees had opportunities to apply the learning?

03 What workplace conditions have supported or hindered application?

04 What feedback or coaching has been provided?

05 Are expectations and performance measures aligned with the learning?

06 What additional actions would support transfer?

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Interview Summary

Key enablers of application:

Key barriers:

Evidence of application:

Further support required:

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Recommended action:

Owner and review date

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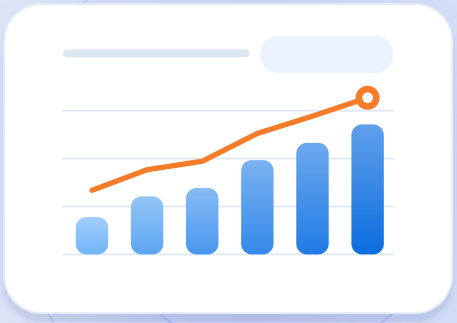
SECTION

PART III · 8 OF 8

Business Results Evaluation Worksheet



Purpose

This worksheet examines whether relevant business or operational measures changed after a learning intervention.

It is particularly useful when the training was designed to address a defined performance problem.

The worksheet does not automatically establish that training caused the change. It supports a structured review of the evidence.

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Section A: Define the Business Outcome

Programme	
Business objective	
Performance measure	
Definition of the measure	
Business owner	

Section B: Record the Baseline and Follow-Up

MEASURE	BASELINE	FOLLOW-UP	DIFFERENCE	MEASUREMENT PERIOD
Measure 1				
Measure 2				
Measure 3				

Data source	

Number of employees, transactions or cases included:

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Any changes in how the measure was collected

Section C: Interpret the Change

What changed after training?

Was the change consistent across the relevant group?

What other factors changed during the same period?

Were there changes in workload, staffing, systems, policies or market conditions?

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Was a comparison group or another credible comparison available?

What evidence supports the interpretation?

What limitations remain?

Section D: Assess the Contribution of Training

How could the training reasonably have influenced the result?

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What evidence shows that participants applied the learning?

What other explanations should be considered?

How confident are we in the conclusion?

- [ ] Strong supporting evidence
- [ ] Moderate supporting evidence
- [ ] Limited supporting evidence
- [ ] Insufficient evidence

NOTE

These labels describe the strength of the available evidence. They are not statistical confidence estimates.

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Section E: Recommended Decision

- [ ] Continue the programme.
- [ ] Continue with modifications.
- [ ] Expand to another group.
- [ ] Conduct additional evaluation.
- [ ] Address workplace barriers first.
- [ ] Discontinue or replace the intervention.

Reason for the recommendation:

Decision owner	
Review date	

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IV

PART IV

Analysis and Reporting



6 sections

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20 Learning Achievement Analysis p. 101

21 Workplace Application Analysis p. 106

22 Training Impact Analysis p. 112

23 Training Evaluation Summary Report p. 117

24 Evaluation Dashboard Template p. 125

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SECTION

PART IV · 1 OF 6

Participant Feedback Analysis



Collecting participant feedback is only the first step. The next step is to organise the responses, identify patterns and decide which findings require action.

A feedback report should not simply display an average satisfaction score. It should help the trainer understand what worked, what needs improvement and why.

19.1 Quantitative Feedback Analysis

For each rating question, calculate the average of valid responses.

FORMULA

Average Rating = Sum of Valid Ratings ÷ Number of Valid Responses

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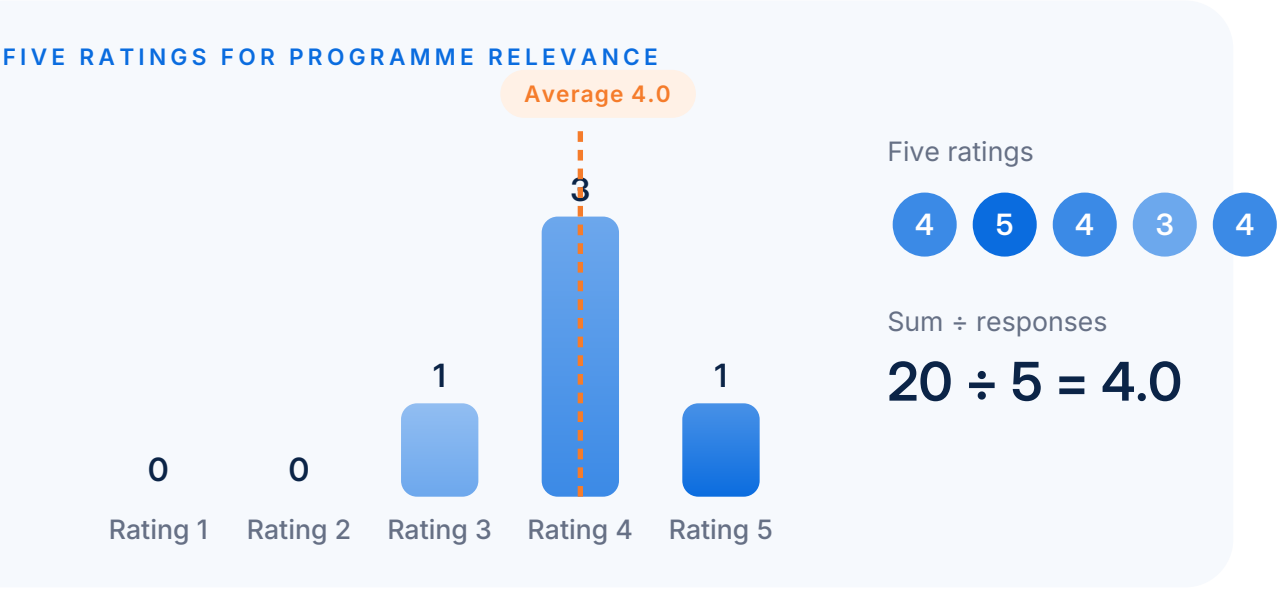
For example, five participants provide the following ratings for programme relevance:



FORMULA

$$\text{Average} = 20 \div 5 = 4.0$$

The average rating is 4.0 out of 5.

However, the average does not show the full distribution. Where useful, also report the number of responses at each rating level.

19.2 Feedback Analysis Worksheet

Programme	
Number of participants	
Number of valid responses	

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Response rate	

EVALUATION AREA	AVERAGE RATING	STRONGEST FINDING	IMPROVEMENT REQUIRED
Programme relevance			
Content quality			
Learning activities			
Facilitation			
Learning materials			
Practical application			

19.3 Analysing Open-Ended Responses

Group written comments into recurring themes.

Possible themes include:

- Relevant content.
- Useful examples.
- Effective facilitation.
- Insufficient practice.
- Unclear explanations.
- Pacing and timing.

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- Need for additional resources.
- Difficulty applying the learning.
- Workplace barriers.
- Suggestions for future programmes.

Do not count every comment as equally important. A rare comment may reveal a serious accessibility, safety or compliance concern that requires immediate attention.

Qualitative Analysis Worksheet

Most frequently mentioned positive themes:

Most frequently mentioned improvement themes:

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Important individual concerns requiring attention:

Differences between participant groups	
Possible explanations for the findings	
Recommended improvements	

19.4 Feedback Interpretation Rules

- Record the number of responses and the response rate.
- Distinguish participant opinions from measured learning outcomes.
- Avoid claiming that every participant agreed when only an average is reported.
- Consider whether a small number of responses could distort the result.
- Look for differences between programme sections or participant groups.
- Review comments alongside the numerical ratings.
- Document limitations.

- Convert important findings into specific improvement actions.

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19.5 Feedback Improvement Log

FINDING	EVIDENCE	PROPOSED IMPROVEMENT	OWNER	REVIEW DATE

Which change will have the greatest likely benefit?

What should remain unchanged?

How will the next delivery establish whether the change worked?

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PART IV · 2 OF 6

Learning Achievement Analysis



Learning achievement analysis examines whether participants acquired the knowledge, skills or capabilities specified in the learning objectives.

The assessment method must match the objective.

A knowledge test can establish whether participants answered selected questions correctly. It cannot, by itself, establish that they can perform a complex workplace task.

20.1 Pre- and Post-Assessment Comparison

Where comparable assessments are available, compare performance before and after training.

Programme	
Assessment method	

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Number of participants assessed before training:

Number of participants assessed afterwards

PARTICIPANT OR GROUP	PRE-TRAINING SCORE	POST-TRAINING SCORE	CHANGE
Participant 1			
Participant 2			
Participant 3			
Participant 4			
Participant 5			

For each participant:

=

FORMULA

Score Change = Post-Training Score – Pre-Training Score

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20.2 Group-Level Analysis

Record the group averages.

Average pre-training score	
Average post-training score	
Difference in average scores	

Number meeting the required standard before training:

Number meeting the required standard afterwards:

Number requiring additional development	
Assessment limitations	

20.3 Interpreting Learning Results

An improvement in test scores can provide evidence of learning, but interpretation requires care.

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Consider:

01 Were the assessments comparable in difficulty?

02 Were the same participants assessed at both stages?

03 Were questions aligned with the objectives?

04 Did participants have access to answers before the second assessment?

05 Was the assessment completed under comparable conditions?

06 Did the assessment test recall or practical application?

07 Were there missing responses?

08 Was the required standard defined in advance?

Where practical performance matters, include a practical assessment or work sample.

20.4 Learning Achievement Summary

Objectives achieved	
Objectives partly achieved	
Objectives not yet achieved	
Common knowledge or skill gaps	

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Participants or groups requiring further support:

Recommended action	
Responsible person	
Review date	

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SECTION

PART IV · 3 OF 6

Workplace Application Analysis



Learning transfer occurs when participants use what they have learned in relevant work situations.

A participant may understand a concept during training but struggle to apply it under pressure, with limited resources or in a workplace that reinforces old habits.

Application analysis should therefore examine both participant capability and the conditions surrounding the work.

21.1 The Workplace Application Review

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Assess five areas:

01 **Capability**
Can the participant perform the required task or behaviour?

02 **Opportunity**
Has the participant had a realistic opportunity to use the learning?

03 **Support**
Has the participant received appropriate guidance, coaching and feedback?

04 **Resources**
Are the tools, information and systems available?

05 **Reinforcement**
Do workplace expectations and management practices support the desired behaviour?

21.2 Application Analysis Worksheet

Programme	
Target behaviour	
Expected workplace standard	
Observed behaviour	

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Evidence source	
Opportunity to apply the learning	
Support available	
Resources available	
Management reinforcement	
Barriers identified	
Recommended actions	

21.3 Application Status Categories

Use consistent descriptions when reporting progress.

01 **Applied consistently**
The behaviour has been demonstrated repeatedly in relevant observed situations.

02 **Applied inconsistently**
The behaviour has been demonstrated, but performance varies across situations.

03 **Not yet applied**
The behaviour has not been observed despite a reasonable opportunity to apply it.

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04

No opportunity yet

The participant has not encountered a suitable situation.

05

Insufficient evidence

Available information does not support a reliable conclusion.

These categories help prevent the mistake of treating a lack of opportunity as a failure to learn.

21.4 Application Improvement Plan

BARRIER	ACTION REQUIRED	OWNER	TARGET DATE	EVIDENCE OF RESOLUTION
Limited practice opportunities				
Insufficient manager feedback				
Unclear expectations				
Inadequate tools or information				
Competing priorities				

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21.5 Workplace Application Summary

What has changed in workplace behaviour?

What evidence supports the conclusion?

What has prevented application?

What should managers do differently?

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What additional practice or learning is required?

When should application be reviewed again?

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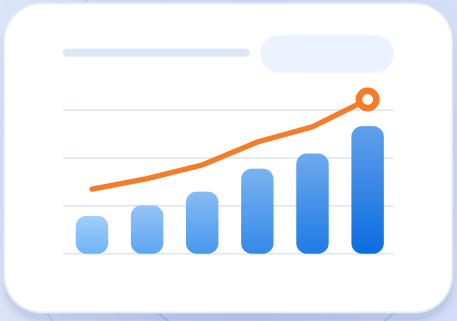
SECTION
PART IV · 4 OF 6

Training Impact Analysis



Training impact analysis examines whether relevant business or operational results changed and what contribution the training may have made.

This is more demanding than collecting participant feedback or conducting a post-training test.

It requires clear outcome measures, suitable baseline information and a careful review of other factors that may have influenced the results.

22.1 Start with the Original Business Need

Return to the reason the training was commissioned.

For example:

- Reduce transaction errors.
- Improve the quality of customer interactions.

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- Strengthen the consistency of managerial feedback.
- Increase sales conversion.
- Improve compliance with operating procedures.

Identify the measure that best represents the desired improvement.

22.2 Establish Comparability

Before comparing results, check whether the measurement conditions are sufficiently similar.

Consider:

- Measurement definitions.
- Time periods.

- Number of cases or transactions.
- Employee population.
- Changes in technology or procedures.
- Workload and staffing.
- Market conditions.
- Other improvement initiatives.

If the measurement method changes, an apparent improvement may reflect a change in measurement rather than a change in performance.

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22.3 Impact Review Worksheet

Programme	
Original business need	
Outcome measure	
Baseline period and result	
Follow-up period and result	
Absolute change	
Relative percentage change, if appropriate	
Relevant changes during the period	
Evidence of learning achievement	
Evidence of workplace application	
Other plausible explanations	
Limitations	
Overall interpretation	

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22.4 Strength of the Impact Conclusion

Use the following descriptive categories.

Strong evidence of contribution

Several relevant sources support the connection between the intervention, observed application and the change in performance. Alternative explanations have been examined.

Moderate evidence of contribution

The results and application evidence are consistent with a contribution from training, but important uncertainties remain.

Limited evidence of contribution

The performance measure changed, but the available information does not clearly establish how much training contributed.

Insufficient evidence

The data is incomplete, the baseline is unavailable or the link between training and the outcome cannot be evaluated responsibly.

These categories are practical reporting aids, not formal causal estimates.

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22.5 Impact Review Questions

01 Did the relevant performance measure change?

02 Was the change sustained over an appropriate period?

03 Did participants demonstrate the intended workplace behaviours?

04 What other changes occurred during the same period?

05 What evidence supports the conclusion that training contributed?

06 What additional evidence would strengthen the evaluation?

07 What should the organisation do next?

22.6 Avoid Unsupported Causal Claims

If error rates decline after a training programme, report the observed decline accurately.

Do not automatically state that training caused the entire improvement.

A stronger conclusion explains the evidence, the observed workplace application and the other factors considered.

Where the decision requires stronger causal evidence, consider an appropriate comparison group, repeated measurements or another credible evaluation design.

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SECTION

PART IV · 5 OF 6

Training Evaluation Summary Report



23.1 Report Cover

TRAINING EVALUATION REPORT

Programme title	
Organisation or department	
Evaluation period	
Prepared by	
Report date	
Version	

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23.2 Executive Summary

Purpose of the evaluation

Programme objectives

Evaluation methods used

Key findings

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Main recommendations

Decisions required

23.3 Programme Overview

Business need	
Target audience	
Number of participants	
Programme duration and delivery mode	
Learning objectives	
Delivery approach	

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23.4 Evaluation Design

EVALUATION AREA	METHOD USED	DATA SOURCE	NUMBER ASSESSED
Reaction			
Learning			
Behaviour			
Results			

Baseline information available	
Evaluation limitations	

23.5 Findings by Evaluation Level

Level 1: Reaction

Level 2: Learning

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Level 3: Behaviour

Level 4: Results

23.6 Key Strengths

What worked well in the programme?

Which learning methods were most effective?

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Which objectives were achieved?

23.7 Areas for Improvement

Which objectives were not fully achieved?

What difficulties did participants experience?

Which workplace barriers affected application?

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What should change in future deliveries?

23.8 Recommendations

RECOMMENDATION	RATIONALE	OWNER	PRIORITY	TARGET DATE

23.9 Conclusion

Summarise what the evidence demonstrates, what remains uncertain and what action is recommended.

Conclusion:

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23.10 Approval and Follow-Up

Report reviewed by	
Decision owner	
Approved actions	
Deferred actions	
Next review date	

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SECTION
PART IV · 6 OF 6

Evaluation Dashboard Template



A dashboard gives stakeholders a concise view of evaluation findings.

It should highlight the measures that matter for the programme's purpose rather than display every available data point.

24.1 Dashboard Overview

Programme	
Reporting period	
Target audience	
Report owner	

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24.2 Key Evaluation Indicators

INDICATOR	TARGET	ACTUAL	STATUS	INTERPRETATION
Participant response rate				
Average reaction rating				
Learning assessment result				
Participants meeting required standard				
Workplace application rate				
Business performance measure				
Follow-up completion				

Define each indicator before reporting it.

For example, “workplace application rate” could mean the proportion of assessed participants who demonstrated the target behaviour. It should not be reported without specifying the population assessed and the evidence used.

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24.3 Executive Interpretation

What is working well?

Which target has not been met?

What requires immediate attention?

What does the evidence say about learning achievement?

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What does the evidence say about workplace application?

What is known about business results?

What remains uncertain?

24.4 Dashboard Action Register

FINDING	ACTION	OWNER	DUE DATE	PROGRESS

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