LEARNING-NEEDS RUBRIC · SIX OBSERVABLE SKILLS

Human AI-skills assessment rubric for workplace learning

Observe six practical skills, record evidence and agree what to practise next. For learning needs—not hiring or business readiness.

A learning resource from Caelan Huntress · Published 12 November 2026 · No coding required

AI Training Curriculum · https://aitrainingcurriculum.com/ai-skills-assessment-rubric/

Use this practical rubric to identify what someone can demonstrate, what support they need and what to practise next. It is a learning conversation based on a short task, not a confidence survey.

Purpose: employee learning and training needs. **Not for:** hiring, promotion, performance ranking, certification, or assessing whether a business is ready for AI implementation. This is a facilitator-created practice rubric, not a validated psychometric test.

How to use the rubric

1. Explain the learning purpose, who can see the record and how long it will be kept. Agree the activity and any accessibility support.
2. Use a short, comparable task with fictional or approved public material. The companion meeting-notes exercise provides a ready-made example.
3. Observe the work and ask the participant to explain their choices. Keep the prompt, marked-up output or a short evidence note where appropriate.
4. Assign a level separately for each skill using observed behaviour. If there is no opportunity to observe a skill, record **N/O — not observed**, not zero.
5. Agree one practice action and a review date. Revisit with a new task of similar difficulty. Record any change in tool, task or support that affects comparison.

Allow about 45 minutes for the companion exercise plus a short learning conversation. Adapt timing to the participant; speed is not a score.

Level descriptions

- **0 — Not yet demonstrated:** The task gave a fair opportunity to show the skill, but it was not demonstrated, even with support. Plan guided practice.
- **1 — With guidance:** Demonstrates the skill with specific prompts, reminders or a worked example. Record the support provided.
- **2 — Independently on this task:** Demonstrates the skill without task-specific prompting in this activity. Do not generalise this to every task or permission level.
- **3 — Explains and adapts:** Demonstrates the skill, explains the reasoning and adapts it to a second example or variation. A confident explanation alone is insufficient.

- **N/O — Not observed:** The task or circumstances did not supply adequate evidence. Provide another opportunity rather than making a judgement.

Skill 1 — Choose a suitable task and permitted information

0: Uses restricted material or cannot recognise the task boundary after support.

1: Selects a suitable task and removes disallowed information after a specific reminder.

2: Independently checks the approved-tool and information boundaries, uses permitted material and recognises when to ask for help.

3: Also explains the boundary and applies it correctly to a second scenario, including when not to use the tool.

Evidence to look for: A stated permitted use, a data-boundary check, and an example of information that must stay out of the tool. Use fictional examples; do not ask someone to reveal a real confidential record as evidence.

Skill 2 — Frame a clear request

0: Does not communicate the task or required output clearly enough to complete the activity, even with support.

1: Uses a template with help to include the task, audience, source and format.

2: Independently specifies a clear task, audience, source boundaries and useful output format.

3: Also explains how those choices affect the output and adapts the request for a different audience or constraint.

Evidence to look for: The actual prompt and an explanation of what the output should contain. Do not reward verbosity by itself.

Skill 3 — Check factual claims against the source

0: Treats a plausible draft as correct despite a guided opportunity to check it.

1: Finds an unsupported claim when directed to a specific sentence or source passage.

2: Independently compares important claims with the source, corrects errors and keeps unknowns visible.

3: Also explains a repeatable checking approach and applies it to a new output or scenario.

Evidence to look for: Marked-up claims, source references, corrections and unresolved questions. For the companion exercise, look for capacity versus bookings, proposed versus approved budget, and unassigned owners.

Skill 4 — Improve the output with specific feedback

0: Cannot make a useful correction or revision during the activity, even with support.

1: Improves the draft using a suggested revision or worked example.

2: Independently identifies a concrete weakness, revises the prompt or draft and checks that the change helped.

3: Also compares alternatives, explains the trade-off and adapts the approach to a second case without losing source accuracy.

Evidence to look for: Before-and-after versions with a reason for the change. The revision should solve an identified problem, not merely sound more polished.

Skill 5 — Apply audience and human-review boundaries

0: Treats a draft as ready to share despite a guided opportunity to identify review or permission requirements.

1: Identifies the audience and review point after a reminder.

2: Independently keeps internal material internal, names a human reviewer and flags missing approvals before use.

3: Also explains how the review route changes for a higher-risk or external audience and applies that distinction in a second scenario.

Evidence to look for: A clear internal/external distinction, the name or role of a reviewer, and a decision to stop when approval is absent. Do not require actual external sharing to demonstrate this skill.

Skill 6 — Explain the work and identify a next step

0: Cannot describe the approach or a useful next step after support in this activity.

1: Describes a useful action with guided questions.

2: Independently explains the task, checks and limitations, and chooses a specific practice goal.

3: Also teaches the approach using an example and adapts the practice goal to a new learning need.

Evidence to look for: A short explanation in the participant's preferred accessible format. Communication style, accent or confidence is not a proxy for AI judgement.

Copyable observation worksheet

Participant or voluntary identifier: [Write here]

Facilitator and date: [Write here]

Task, source material and approved tool: [Write here]

Access arrangements, support provided and relevant context: [Write here]

Skill	Level (0–3 or N/O)	Observed evidence	Next practice action
Suitable task and permitted information	[Write here]	[Write here]	[Write here]
Clear request	[Write here]	[Write here]	[Write here]
Source-based checking	[Write here]	[Write here]	[Write here]

Skill	Level (0–3 or N/O)	Observed evidence	Next practice action
Specific revision	[Write here]	[Write here]	[Write here]
Audience and human review	[Write here]	[Write here]	[Write here]
Explanation and next step	[Write here]	[Write here]	[Write here]

Participant's reflection: [Write here]

One agreed practice priority: [Write here]

Support person and review date: [Write here]

Who can access the record, and deletion/review date: [Write here]

Turn observations into a learning plan

Do not add the levels into a single readiness score or invent a pass mark. The skill profile is more useful than a total, and a total can hide a serious checking or information-handling gap.

- If safe information handling is uncertain, return to approved-tool and data-boundary practice before practising with real work information.
- If prompting is adequate but checking is weak, practise finding unsupported claims rather than collecting more prompt templates.
- If a participant succeeds with support, document what support worked and offer another comparable practice opportunity.
- If the task was inaccessible or unfamiliar, fix the activity design before drawing conclusions about ability.
- If someone performs well in this exercise, retain normal workplace approval, supervision and policy requirements. Training completion does not authorise unrestricted AI use.

Worked interpretation — illustrative, not a result

A participant writes a clear request independently but only notices the fictional printing budget is unapproved after a facilitator points to that sentence. You might record level 2 for clear request and level 1 for source-based checking, with the specific evidence and support noted. A useful next activity is checking a new draft for approval-status errors without that prompt.

This example explains how to use the rubric. It is not a score or outcome from a real person, and it does not establish the rubric's reliability.

Continue with practical learning

Use the 45-minute AI workshop exercise to collect observable evidence, then adapt the four-week team AI training plan around the needs you find.

This resource assesses human learning needs only. For business implementation support rather than a people-skills diagnostic, visit AI Agent Agency.