

Commission the formation your people need next.

Use this worksheet to prepare a programme conversation. It helps an institution, association or family define the transition, the people and the practical conditions for delivery.

Complete this with the decision owner. Use group-level information only; do not include medical records, private reflections or sensitive individual performance information.

01 Name the transition

Who is entering a new stage of responsibility? Describe what will change, when it changes and what makes this transition demanding. Identify the relevant cohort or the closest fit.

02 Define useful change

Choose up to three outcomes you want participants to practise: judgement, ethical confidence, self-leadership, boundaries, relationships or stewardship. What observable behaviour would demonstrate each?

03 Set the participation conditions

Record the likely group size, location, language, accessibility needs and preferred timing. For school groups, identify the adult lead and the safeguarding or consent processes that must apply.

Turn the brief into a workable scope.

A clear scope joins the learning experience to the setting in which participants must use it. Dates, cost and the length of the initial lab are agreed in the proposal.

04 Choose the depth to discuss

Ignition: a facilitated lab, with its length scoped for the cohort. Formation: a 90-day journey. Stewardship: a 180-day journey. Which depth fits the need, calendar and available follow-through?

05 Assign the practical owners

Who can approve budget? Who coordinates participants, venue and scheduling? Who supports practice between sessions? Identify any decision dates or procurement requirements.

06 Agree appropriate evidence

What delivery or learning evidence would be useful? Agree its scope before delivery. Private journals stay private. Leaders in Industry does not include organisational reporting; do not plan employer access to personal reflection.

07 Send a concise commissioning brief

Summarise: the group, the transition, the desired outcomes, preferred depth, timing and decision owner. Send the brief using the contact details below; the delivery team can then scope fit and a proposal.

Before confirmation: Agree the cohort, inclusions, facilitators, delivery setting, fee, payment terms, participant support, data handling and any reporting boundaries. This worksheet is a planning aid; it is not an enrolment contract or a confirmed booking.