

PARTICIPANT-SELECTION WORKSHEET

Match the learning work to the role

Use role requirements and actual opportunities to practise. This planning aid does not rank employees, establish promotion readiness or authorize use of private personnel information.

Planning question	Fictional example	Your planning record
Which work must participants practise?	Agreeing a routine delegation boundary with a receiving team leader.	
Which roles do that work?	Supervisors already assigned the relevant responsibility under current policy.	
What starting capability is needed?	Can explain the current standard and distinguish a routine choice from an exception.	
Is the authority settled?	Process owner must confirm the boundary before the group rehearses it.	
Will an appropriate opportunity occur?	The manager identifies a suitable ordinary handoff; absence remains a planning gap.	
Who supplies support and feedback?	An available manager who understands the work and can review a permitted example.	
What participation arrangements are needed?	Confirm time, materials and access through the approved internal process. No health details in this sheet.	

Decision

Identify the group for which the proposed work fits, what needs adaptation and who can settle outstanding conditions. Attendance eligibility and an available seat do not prove readiness for the next assignment. Use the organization's actual selection and approval process.

Read alongside: Role-specific design and prerequisites.

SPONSOR OPERATING AGREEMENT

Name the support the organization will supply

This is an illustrative working agreement for a development effort already selected, not a supplier contract or a promise of results.

Commitment	Fictional sponsor agreement	Check at the review
Work and authority	The process owner confirms the permitted delegation boundary before practice starts.	Is the approved boundary clear, or is an operating decision still open?
Time and competing priorities	The operations sponsor protects the stated practice and review time and identifies work moved out of that period.	Can the named people actually participate? Keep unmet coverage visible.
Manager contribution	Managers arrange appropriate assignments and review one permitted attempt with the participant.	Did a relevant opportunity occur and was useful feedback available?
Barrier escalation	Unresolved authority goes to the approved owner; the trainer does not allocate authority.	What remains with the sponsor rather than the participant?
Information and reporting	Use approved summaries of practice. HR records coverage and common barriers without private conversation transcripts.	Does reporting serve the agreed learning purpose and preserve the stated limits?
Next decision	Sponsor examines the evidence and support demand before approving any expansion.	Continue, adapt, defer or stop within actual authority.

Sponsor confirmation and authorized decision route

Unmet support commitment, owner and next decision

Read alongside: Manager and HR support for application.

COHORT DECISION GUIDE

Proceed, resize, defer or stop deliberately

No minimum group size or cancellation deadline is prescribed here. Check the actual agreement and organizational requirements with the responsible owners.

Finding	Choice to examine	Consequence to record
Participants and prerequisites are ready; the proposed sequence fits the actual group.	Proceed within the approved arrangement.	Confirm the delivery team, materials, feedback capacity and internal support.
Fewer participants can attend, but the work and feedback remain suitable.	Consider a smaller cohort with the provider and sponsor.	Clarify price, learning design and coverage. A smaller group is not automatically the same purchase.
Authority or essential preparation is not settled.	Defer the dependent activity while the authorized owner resolves it.	Record who decides and what evidence makes a new start appropriate.
Protected time or required access is unavailable.	Revise scope or defer rather than keep the promise with missing support.	State what is removed, what remains feasible and what needs new agreement.
The learning need no longer fits, or the required conditions cannot be provided.	Consider stopping through the actual approval and commercial process.	Record the reason, remaining responsibilities and any contractual question for qualified review.

Fictional decision

A cohort has ten seats but only six managers have suitable practice opportunities. The sponsor first asks whether the next activity can serve those six and what preparation the other four need. It does not record all ten as ready, improvise authority or assume the fee changes proportionately. The provider and authorized buyer must agree any revised purchase.

Read alongside: Readiness and conditions for expansion.