



HR DELIVERY
Making Sure HR Delivers

HR DELIVERY / PROFESSIONAL PRACTICE

Supporting documentation pack for coaches

The agreements, records and working documents that make coaching dependable.



64 DOCUMENTS / 6A ALIGNED / READY TO ADAPT

Guidance. Fillable forms. Worked examples. Editable templates.

Professional records. A trustworthy relationship.

The documents around the conversation

This pack provides 64 operational documents for adult workplace and executive coaching. It covers the first enquiry, the agreement, the session record, the work between meetings, the progress review, the ending and the management of professional practice. It complements the HR Delivery activity toolkit and question bank rather than repeating them.

Records with a job to do

A document should make an agreement usable, preserve an important decision, support learning or meet a justified professional responsibility. The pack is a menu. It is not an instruction to open 64 records for every person. Select a proportionate set and avoid copying the same sensitive account into several places.

The established 6A architecture

Align, Agree, Assess, Activate, Apply and Assure retain their published meanings. Organisation, programme and engagement responsibilities remain distinct. The final professional-practice section supports the whole journey; it is not a seventh coaching stage. [H1-H2]

Three kinds of material

The stage architecture and information boundaries come from the supplied HR Delivery publications. External professional and regulatory references inform the coverage and safeguards. The CD01-CD64 forms, guidance and worked examples are new editorial applications, not official forms issued by those bodies.

Keep the person and the purpose visible

Use work-related descriptions, check understanding and leave room for the coachee to disagree. A completed form is not proof of informed agreement, professional competence or successful development. The record should support the conversation, not become its substitute.

Prepare for actual use

Read the guide before completing a document. Localise legal, privacy, emergency, technology and commercial arrangements before issue. Keep private coaching material separate from routine administration and sponsor reporting. The local deployment checklist provides the decisions to settle first.

The care behind the conversation.



DR PHILLIP WELSH

HR Delivery

Foreword text prepared for review and approval

The quiet work that protects trust

Coaching is often remembered for a question, a moment of recognition or a decision the person finally feels able to make. Much of the work that makes those moments possible is less visible: a clear agreement, a dependable follow-up, a carefully written note and a boundary that remains intact when someone asks for more information.

Enough structure, not more bureaucracy

The purpose of these documents is not to make every relationship feel administered. It is to reduce uncertainty where uncertainty can damage trust. Who is the client? What may be shared? What did the coachee choose? What support is still required? A concise, well-kept record can help everyone answer those questions without turning the conversation into a report for somebody else.

Write with care

Write in a way that distinguishes what happened from what you think it means. Be accurate about what was delivered and modest about what the evidence establishes. A person should not become a label in a file, and a sponsor should not receive private material simply because they paid for the service.

Use the pack thoughtfully

Choose the documents that serve the engagement, discuss them in plain language and adapt the practical arrangements responsibly. The same discipline applies to our own practice: seek supervision, learn from concerns, maintain competence and bring a relationship to a clear ending when its purpose is complete.

A professional habit

My hope is that this pack helps coaches spend less effort inventing paperwork and more attention on the people they support. Useful documentation is not separate from humane coaching. Done well, it is one of the ways we make that coaching dependable.



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Find the record you need.

The document index follows immediately. Each section includes guidance, forms and a local directory.

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Six coaching stages plus one cross-cutting professional-practice record family.



The document directory

Select a document. CD identifiers are new pack references; they do not replace the T and X tool identifiers.

ID	Document	Guide	Form
CD01	Enquiry and referral record	17	18
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CD03	Sponsor commissioning brief	21	22
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Source architecture H1-H2 | Original CD document family / operational selection is not a mandatory checklist.



The document directory

Select a document. CD identifiers are new pack references; they do not replace the T and X tool identifiers.

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CD17	Accessibility and participation adjustment plan	59	60
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CD20	Re-contracting and scope-change record	65	66
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CD32	Shared session summary	95	96

Source architecture H1-H2 | Original CD document family / operational selection is not a mandatory checklist.



The document directory

Select a document. CD identifiers are new pack references; they do not replace the T and X tool identifiers.

ID	Document	Guide	Form
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CD34	Coach post-session reflective note	99	100
CD35	Session attendance and coaching-hours log	101	102
CD36	Missed-session and contact record	103	104
CD37	Workplace experiment agreement	107	108
CD38	Coaching action and commitment log	109	110
CD39	Between-session activity brief	111	112
CD40	Private coaching progress review	113	114-115
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CD47	Maintenance and follow-up plan	131	132
CD48	Pause, early ending and rematch record	133	134

Source architecture H1-H2 | Original CD document family / operational selection is not a mandatory checklist.



The document directory

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CD50	Feedback, complaint and resolution record	138	139-140
CD51	Ethical decision and professional consultation record	141	142
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CD53	Coaching supervision agreement	147	148
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CD55	CPD and observed-practice development record	152	153
CD56	Coaching-hours verification and permission	154	155
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CD60	Practice continuity and records-custodian plan	165	166
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CD62	Team or group coaching supplementary agreement	170	171
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CD64	Practice quality and case-file review	174	175

Source architecture H1-H2 | Original CD document family / operational selection is not a mandatory checklist.

HR DELIVERY / OPERATIONAL PRACTICE

THE 6A FRAMEWORK

One system around the work.

Preserve the stage purpose and return to an earlier A when the agreement, evidence or context changes.



01 ALIGN

Purpose and value hypothesis

02 AGREE

Four-way agreement

03 ASSESS

Goal, baseline and formulation

04 ACTIVATE

Insight, options and choice

05 APPLY

Work experiments and feedback

06 ASSURE

Quality and contribution decision

ORGANISATION

Policy, resources, culture and governance.

PROGRAMME

Access, matching, operations and evaluation.

ENGAGEMENT

Agreement, sessions, practice, review and closure.

ETHICAL / USEFUL / APPLIED / EVIDENCED

H1 pp.4-7; H2 pp.5-6. Original 6A artwork retained. Professional-practice records are not another stage.



HR DELIVERY / OPERATIONAL PRACTICE

HOW TO USE THIS PACK

A working library, not a paperwork quota.

Choose by need

Use the core route for a straightforward engagement, then add documents when their purpose arises. A sponsored programme, self-funded relationship and internal coaching service need different commercial and reporting arrangements.

Read the guidance first

Each document explains its purpose, timing, owner and permitted audience. Four steps show how to complete it; the worked situation illustrates the judgement required. Read the caution before using a sensitive or consequential form.

Use the appropriate file format

The complete PDF contains guidance and fillable forms. The separate form collection contains the blank records. Individual PDFs include the guide and form. Word templates are editable layouts; duplicate the required document instead of circulating the whole library.

Make records proportionate

A short record can be sufficient. Use N/A with a reason where a field is not relevant. Leave an unresolved decision visibly pending. A blank is not approval; a tick is not evidence unless the supporting record is clear.

Keep the content visible

PDF fields hold more text than a printed box may show. Before sharing or printing, check the saved result. Use a continuation page or the Word template for a longer entry rather than shrinking it into unreadable text.

Review and version

Use an engagement reference, document version and date. Preserve substantive amendments. Check recipients and remove unused fields before issue. Revisit the agreement after a material change, and close access and records deliberately.

Sign with an approved method

Typed names record acknowledgement but are not verified digital signatures. Contracts and consents need the applicable signing and evidence process. The pack does not create an electronic-signature service.

Maintain a clean master

Store blank masters separately from live files. There are no client records in this pack. The E-204 examples are fictional and should never be retained as evidence of a real decision.

Different records. Different permissions.

Do not share the complete engagement folder with a sponsor or copy private notes into an administrative system.

ADMINISTRATIVE FILE

Enquiry, terms, scheduling and billing

CD01, CD07-CD09, CD18, CD35, CD61

Authorised service roles. No routine session narrative.

PRIVATE COACHING FILE

Session notes, evidence and private reviews

CD21-CD24, CD31, CD34, CD40, CD45

Restricted to the agreed purpose and actual rights; not automatically privileged.

AGREED SHARED OUTPUT

Shared session and sponsor summaries

CD32, CD41, CD52

Release the specific version to the agreed recipient, not the source private file.

RESTRICTED PRACTICE FILE

Supervision, concerns and incident handling

CD49-CD60, CD64

Appropriate professional or specialist roles; minimum necessary detail.

THE RELEASE CHECK

Purpose > recipient > authority > minimum content > version check > secure transfer.

An optional disclosure uses CD13; a compulsory request or incident follows the appropriate specialist route.

Set the local arrangements.

These decisions cannot be completed by a generic international template.

01**Service and parties**

Confirm the actual contracting parties, responsible roles, service scope and any parallel employment process. CD03, CD09-CD10.

02**Legal and commercial terms**

Review governing law, dispute route, liability, insurance, tax, consumer rights where relevant, fees, cancellation and refunds. Do not invent a standard period or cap. CD09, CD61.

03**Privacy and record lifecycle**

Determine controller/processor roles, purposes, lawful bases, rights, recipients, transfer safeguards and category-specific retention. CD11-CD12, CD57-CD59.

04**Safety and professional boundaries**

Verify the local emergency, safeguarding, referral, complaint and independent consultation routes. Do not wait for a form when immediate action is required. CD49-CD51.

05**Technology and access**

Approve platforms, access permissions, recording and AI uses separately. Provide a workable alternative where optional processing is declined. CD14-CD17.

06**Practitioner and programme readiness**

Check competence, supervision, capacity, appointment evidence and continuity. Decide who approves the final local form set. CD05, CD53-CD55, CD60, CD64.

HR DELIVERY / OPERATIONAL PRACTICE

THE THREE RECORDS TO KEEP DISTINCT

A note is not a sponsor report.

The same session can produce different records for different purposes.

CD31 / confidential coach file note

Record logistics, the agreed focus, the coachee's attributed account, direct observations, intervention, response and next step. A hypothesis is provisional and should be labelled. The form deliberately separates substantive content from the amendment trail.

CD32 / shared session summary

Agree a short account of learning and the chosen next step with the coachee. It does not need the coach's private interpretations, unnecessary third-party details or a transcript. Define the recipients before sending it.

CD41 and CD52 / sponsor updates

Prepare a new, approved account of the agreed goal, relevant workplace evidence and support needs. The sponsor update should not be an extract of the private file. Record the version and authority for release.

Use attributed, observable language

Instead of writing "The client is controlling", record "The coachee described rewriting the draft after a risk update was missing". This is an editorial example of more precise recording, not a conclusion about a person.

Correct without rewriting history

Date and attribute a substantive correction. Preserve the earlier record where appropriate. Do not retrospectively improve a note to make the coaching look successful. A lawful hold or complaint process may affect routine disposal.

Keep realistic privacy expectations

Restricted handling is essential, but labels do not create absolute secrecy or legal privilege. Applicable access rights, compulsory requests and third-party interests need a qualified, case-specific decision. Record only what is useful and justified.

The everyday document set.

This is a suggested route for a straightforward adult coaching engagement, not a universal minimum or an additional approval model.

01**Open the work**

CD01-CD04; CD08

Clarify the enquiry, coachee purpose, sponsor role where relevant, suitability and file ownership.

02**Agree the relationship**

CD09-CD12; CD14; CD19

Use service terms where needed, preserve the four roles in sponsored work, explain information and practical arrangements.

03**Define the development**

CD21; CD28

Record a goal, evidence of the starting point and a small number of agreed development priorities.

04**Run each session**

CD29-CD32; CD35

Prepare, agree the immediate focus, keep a concise private note and an authorised shared summary; log actual delivery.

05**Follow learning into work**

CD37-CD41

Use a bounded experiment, action log and progress review; share a separate sponsor update only when agreed.

06**Review and close**

CD45-CD47; CD52; CD57

Review contribution and limits, confirm the ending, retain a maintenance plan and close the information lifecycle.

Original selection route. Add assessment, recording, AI, concern, supervision and practice records only when their purpose arises.



01

Align

Start with a clear commission.

The intake and commissioning records establish purpose, fit, competence and a well-controlled engagement file before substantive coaching begins.

8 DOCUMENTS / CD01-CD08

[Open the section document directory >](#)



6A / ALIGN

DOCUMENT INDEX / ALIGN

The document directory

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SELECT. COMPLETE. CHECK. FILE.

Keep the original blank master. Save an authorised working copy and share only the information agreed for that recipient.

Source architecture H1-H2 | Original CD document family / operational selection is not a mandatory checklist.

6A / ALIGN

CD01

Enquiry and referral record

Establish who is asking for coaching, what can be discussed and how the first contact should be handled.

USE WHEN	At first enquiry; before substantive personal information is collected.
OWNER	Coach or authorised intake coordinator
PERMITTED AUDIENCE	Intake team; only agreed administrative details to the referrer

COMPLETE THE DOCUMENT

- 01 Identify the referrer and whether the prospective coachee knows about the referral.
- 02 Capture the work-related reason in the referrer's words, not as a diagnosis.
- 03 Contact the coachee through an agreed safe route and provide the privacy notice.
- 04 Record the next step and owner without implying that a place or outcome has been promised.

JUDGEMENT AND BOUNDARY

Do not accept a secret referral as permission to gather a dossier. Record urgent concerns through the approved concern route, not this general enquiry form.

WORKED SITUATION / FICTIONAL

Fictional E-204: a programme coordinator requests coaching for a newly appointed director. The director has agreed to contact, but has not accepted the proposed goal. An introductory conversation is offered; no assessment is ordered.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1 | Original guidance and form. Select when relevant.



6A / ALIGN

CD01

Enquiry and referral record

First contact

WORKING COPY / Intake team; only agreed administrative details to the referrer

REFERENCE

VERSION / DATE

Enquiry reference

Received date / time

Referrer name / role

Authorised contact route

Reason for enquiry

Work question; label whose account this is.

Coachee aware of referral?

Select / not yet decided

Information provided and permission to contact

Privacy notice version; safe method; only necessary contact details.

Next step, owner and due date

Introductory call, information request, alternative route or close enquiry.

Enquiry status

Select / not yet decided

Basis: H1, R1 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

CD02

Coachee intake and work context

Capture a proportionate starting account in the coachee's own words.

USE WHEN	After initial information is supplied and before agreeing the focus.
OWNER	Coachee with coach
PERMITTED AUDIENCE	Coach and coachee; no automatic sponsor access

COMPLETE THE DOCUMENT

- 01** Invite the coachee to describe what they want from coaching.
- 02** Ask for one recent work episode and relevant role conditions.
- 03** Record practical preferences without collecting a medical or personal history by default.
- 04** Confirm the account with the coachee and identify what needs further discussion.

JUDGEMENT AND BOUNDARY

Do not ask for diagnoses, family histories, protected characteristics or personal identifiers unless necessary for a separately justified purpose.

WORKED SITUATION / FICTIONAL

E-204: the director wants to delegate recommendations without losing visibility of material risk. Role authority is unclear when a scope change arrives late; that issue is distinguished from the director's own practice.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R1 | Original guidance and form. Core-route option.



6A / ALIGN

CD02

Coachee intake and work context

Your starting point

WORKING COPY / Coach and coachee; no automatic sponsor access

REFERENCE

VERSION / DATE

Engagement reference

Preferred name / pronouns (optional)

What I would like coaching to help with

Use your own wording; you may decline a prompt.

A recent work example

What happened; what you did; what was difficult.

Role, responsibilities and relevant conditions

Authority, workload, support and current changes.

Strengths and support already available

What helps; what you have already tried.

Practical preferences and questions

Language, access, format, scheduling or information concerns.

Initial focus and matters to revisit

No final psychological conclusion is required.

Basis: H1, R1 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ALIGN

CD03

Sponsor commissioning brief

Clarify the business purpose and the sponsor's responsibilities without commissioning a predetermined psychological verdict.

USE WHEN	Before a sponsored engagement or programme begins.
OWNER	Sponsor with coach or programme owner
PERMITTED AUDIENCE	Sponsor, coach and programme owner; share agreed purpose with coachee

COMPLETE THE DOCUMENT

- 01 Separate the desired work outcome from a label about the person.
- 02 Ask what the sponsor can authorise or provide.
- 03 Specify the delivery and progress information needed, not private content.
- 04 Agree how the proposed purpose will be discussed with the coachee.

JUDGEMENT AND BOUNDARY

Coaching is not a covert selection, investigation or performance-assessment process. Declare any parallel formal process.

WORKED SITUATION / FICTIONAL

E-204: the sponsor wants clearer cross-functional recommendations and fewer late escalations. They agree to clarify decision authority and protect preparation time. No promotion recommendation or private report is commissioned.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1 | Original guidance and form. Select when relevant.



6A / ALIGN

CD03

Sponsor commissioning brief

Commission and contribution

WORKING COPY / Sponsor, coach and programme owner; share agreed purpose with coachee

REFERENCE

VERSION / DATE

Sponsor / role

Programme owner / contact

Work outcome and reason it matters

Evidence, timescale and affected work; avoid personality labels.

Potential coaching contribution

What the person could practise, alongside non-coaching actions.

Sponsor commitments

Authority clarification, work opportunity, time and feedback.

Parallel processes and conflicts

Selection, performance, investigation or other advisory roles.

Information requested and review points

Proposed content, recipient, purpose and timing; subject to CD10-CD11.

Decision and consultation with the coachee

Who will explain the proposal; what remains open?

Basis: H1, R1 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

CD04

Coaching suitability and readiness decision

Make a reasoned decision about whether coaching is appropriate and feasible now.

USE WHEN	Before acceptance; revisit after material change or concern.
OWNER	Coach and coachee
PERMITTED AUDIENCE	Decision shared only at the agreed level; detailed reasons remain restricted

COMPLETE THE DOCUMENT

- 01 Explore the coachee's question and freedom to choose.
- 02 Distinguish development from missing instruction, authority, formal process or specialist support.
- 03 Check competence, capacity and conditions for practical application.
- 04 Agree proceed, proceed with conditions, defer or another route; name the next owner.

JUDGEMENT AND BOUNDARY

This is not a clinical screen, risk score or test of coachability. A decision not to proceed is not evidence of low potential.

WORKED SITUATION / FICTIONAL

E-204 proceeds with conditions: the sponsor must clarify who approves material scope changes. Coaching will address the director's meeting and delegation practices, not substitute for that authority decision.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R1 | Original guidance and form. Core-route option.

6A / ALIGN

CD04

Coaching suitability and readiness decision

Fit decision

WORKING COPY / Decision shared only at the agreed level; detailed reasons remain restricted

REFERENCE

VERSION / DATE

Developmental question and evidence

What would a coaching conversation add?

Other response needed

Management, technical instruction, mediation, organisational action or qualified support.

- ☐ Purpose explained and participation discussed
- ☐ Coach competence and conflicts checked
- ☐ Time, access and work opportunity discussed
- ☐ Information boundaries can be explained
- ☐ Appropriate concern and referral route identified

Conditions or unresolved issues

Name the responsible person and the evidence needed.

Decision

Select / not yet decided

Agreed explanation and next step

Record only what the recipient needs to know.

Basis: H1, R1 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ALIGN

CD05

Coach capability and due-diligence record

Verify that the coach or provider can meet this engagement's needs and constraints.

USE WHEN	At appointment and at relevant renewal points.
OWNER	Coach / commissioning lead
PERMITTED AUDIENCE	Authorised commissioning and quality roles

COMPLETE THE DOCUMENT

- 01 Check qualifications and claims against evidence rather than a profile alone.
- 02 Consider relevant observed practice, supervision and experience.
- 03 Check insurance or other requirements applicable to the actual service and location.
- 04 Record the decision, limits and verification dates.

JUDGEMENT AND BOUNDARY

Professional membership, a toolkit or a credential alone does not establish competence for every client, assessment or setting.

WORKED SITUATION / FICTIONAL

E-204: the appointment review records evidence of executive coaching practice and an established supervision arrangement. Psychometric interpretation is restricted to instruments for which competence is evidenced.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1, R3, R13 | Original guidance and form. Select when relevant.



6A / ALIGN

CD05

Coach capability and due-diligence record

Appointment evidence

WORKING COPY / Authorised commissioning and quality roles

REFERENCE

VERSION / DATE

Coach / provider

Reviewer / review date

Area	Evidence / verification	Scope or limitation	Next review
Training and credentials			
Relevant experience			
Observed practice			
Supervision			
Insurance / local requirements			
Assessment / digital competence			

Appointment decision and restrictions

Service scope, escalation support and matters to resolve.

Declarations and confirmation

Coach declaration; reviewer decision; date.

Basis: H1, R1, R3, R13 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ALIGN

CD06

Conflict of interest and multiple-role declaration

Surface interests, relationships or duties that could affect impartiality or trust.

USE WHEN	Before matching; whenever another role or interest emerges.
OWNER	Coach; reviewed with appropriate parties
PERMITTED AUDIENCE	Restricted professional file; only necessary disclosure to affected parties

COMPLETE THE DOCUMENT

- 01 Identify actual, potential and perceived conflicts.
- 02 Consider other clients, HR roles, reporting lines, procurement and referral benefits.
- 03 Discuss proportionate safeguards without revealing another client's confidential information.
- 04 Record whether to proceed, separate roles, seek advice, rematch or withdraw.

JUDGEMENT AND BOUNDARY

A client's agreement does not make every conflict manageable. Do not promise independence while retaining incompatible duties.

WORKED SITUATION / FICTIONAL

E-204: the coach is asked to advise a promotion panel involving the coachee. They decline that separate role and record the separation, rather than seek blanket permission to reuse session information.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1, R2 | Original guidance and form. Select when relevant.



6A / ALIGN

CD06

Conflict of interest and multiple-role declaration

Conflict and response

WORKING COPY / Restricted professional file; only necessary disclosure to affected parties

REFERENCE

VERSION / DATE

Declaration date

Coach / engagement reference

Interest, role or relationship

Who may be affected; disclose the minimum necessary.

Potential impact on judgement, trust or information

Distinguish actual circumstances from anticipated risk.

Safeguards and consultation

Role separation, access limits, supervisor or specialist advice.

Decision

Select / not yet decided

Necessary disclosure and agreement

Recipients, content, date and unresolved differences.

Review trigger and accountable owner

Record the next review point.

Basis: H1, R1, R2 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ALIGN

CD07

Coaching proposal and scope of work

Offer a clear service, assumptions and cost basis before a binding agreement is finalised.

USE WHEN	After a fit discussion; before appointment or renewal.
OWNER	Coach / provider
PERMITTED AUDIENCE	Prospective contracting parties; no private session material

COMPLETE THE DOCUMENT

- 01 Describe the developmental purpose and service boundaries.
- 02 Specify deliverables, sessions, review arrangements and responsibilities.
- 03 Show charges, assumptions, exclusions and approval validity.
- 04 Mark the proposal as non-binding unless the approved legal terms say otherwise; move agreed terms to CD09.

JUDGEMENT AND BOUNDARY

Do not guarantee behaviour change, promotion, financial return or clinical outcomes. Do not price a private psychological report that the coachee has not agreed to.

WORKED SITUATION / FICTIONAL

E-204 proposal: six 60-minute sessions, initial contracting and two agreed progress reviews. Assessment charges are optional and require a separate decision; the proposal excludes promotion recommendations.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1 | Original guidance and form. Core-route option.



6A / ALIGN

CD07

Coaching proposal and scope of work

Service proposal

WORKING COPY / Prospective contracting parties; no private session material

REFERENCE

VERSION / DATE

Proposal reference / version

Prepared for / validity date

Purpose and proposed scope

Need, population or person; distinguish coachee agreement still needed.

Service / deliverable	Quantity / cadence	Owner / timing

Assumptions, exclusions and client responsibilities

Work opportunity, sponsor time, access and non-coaching actions.

Cost item	Basis / quantity	Currency / amount

Approval route and next step

Tax treatment, expenses, procurement and legal review to confirm.

Basis: H1, R1 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

CD08

Engagement file cover and document register

Keep the case organised without placing all records in one shareable folder.

USE WHEN	Open at acceptance; update through closure.
OWNER	Coach / authorised case administrator
PERMITTED AUDIENCE	Administrative index with references only; separate protected content

COMPLETE THE DOCUMENT

- 01 Assign a non-descriptive engagement ID and keep any identity key separately.
- 02 Record the current agreement, goals, review dates and service status.
- 03 Index documents by classification, location and version rather than duplicate their contents.
- 04 Set access and disposal decisions for each record class.

JUDGEMENT AND BOUNDARY

A coded name is not necessarily anonymous. A combined file or workbook is not safe to share merely because confidential tabs are hidden.

WORKED SITUATION / FICTIONAL

E-204: contracts and invoices sit in administrative storage; private session records and authorised assessment reports have narrower access. The register contains secure references, not copies of those records.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R1, R9, R10 | Original guidance and form. Core-route option.



6A / ALIGN

CD08

Engagement file cover and document register

Case control

WORKING COPY / Administrative index with references only; separate protected content

REFERENCE

VERSION / DATE

Engagement ID

Coach / programme contact

Start / planned closure

Current agreement version

Service status

Select / not yet decided

Document ID / version	Classification	Secure location / custodian	Review / disposal trigger

Access decisions and changes

Who has access; who approved it; when removed.

Next operational action

Owner and date; do not paste private content here.

Basis: H1, R1, R9, R10 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



02

Agree

Protect the relationship with a usable agreement.

These documents distinguish service terms, the four-way relationship, information permissions and the practical conditions for coaching. Revisit them when the context changes.

12 DOCUMENTS / CD09-CD20

[Open the section document directory >](#)



6A / AGREE

DOCUMENT INDEX / AGREE

The document directory

Select a document. CD identifiers are new pack references; they do not replace the T and X tool identifiers.

ID	Document	Guide	Form
CD09	Coaching services agreement	35	36-40
CD10	Four-way coaching relationship agreement	41	42-43
CD11	Information-sharing and access protocol	44	45
CD12	Coaching privacy notice	46	47-48
CD13	Specific disclosure permission and release	49	50
CD14	Remote coaching and contact arrangements	51	52
CD15	Recording, observation and transcript permission	53	54-55
CD16	AI and digital-tool decision record	56	57-58
CD17	Accessibility and participation adjustment plan	59	60
CD18	Session schedule and administrative contact plan	61	62
CD19	Working relationship and session boundaries	63	64
CD20	Re-contracting and scope-change record	65	66

SELECT. COMPLETE. CHECK. FILE.

Keep the original blank master. Save an authorised working copy and share only the information agreed for that recipient.

Source architecture H1-H2 | Original CD document family / operational selection is not a mandatory checklist.

6A / AGREE

CD09

Coaching services agreement

Provide substantive specimen terms and completed schedules for the commercial coaching service.

USE WHEN	Before paid or sponsored delivery; adapt for internal provision.
OWNER	Provider and authorised purchaser; coach confirms service scope
PERMITTED AUDIENCE	Contracting parties; only relevant schedules to coachee / programme owner

COMPLETE THE DOCUMENT

- 01 Complete the schedules with actual parties, scope, fees and jurisdictions.
- 02 Review every specimen clause with appropriate local legal and privacy advice.
- 03 Resolve the relationship and information boundaries through CD10-CD12; do not rely on the purchaser alone.
- 04 Approve the final version through the agreed signing process and issue copies to the relevant parties.

JUDGEMENT AND BOUNDARY

Specimen, not legal advice. No universal waiver, liability cap, tax rate, cancellation period or retention period is supplied. Do not sign while material schedules or local clauses remain unresolved.

WORKED SITUATION / FICTIONAL

E-204: the purchaser contracts for six sessions and two progress reviews. The separate four-way agreement protects private notes. A late scope request needs written variation; coaching outcomes are not warranted.

WORKING FORM

5 pages

[Open the form >](#)

Basis: H1, R1, R2, R4 | Original guidance and form. Core-route option.



6A / AGREE

CD09

Coaching services agreement

1 / Parties and service schedule

WORKING COPY / Contracting parties; only relevant schedules to coachee / programme owner

REFERENCE

VERSION / DATE

Specimen for local approval

Complete the schedules, settle unresolved terms and obtain suitable legal review before signing. The commercial parties may differ from the four coaching roles; record both accurately.

Provider legal name / address

Purchaser legal name / address

Named coach / contact

Coachee / programme reference

Start / planned end date

Agreement version / effective date

Developmental purpose and service scope

Cross-reference the four-way agreement; no predetermined private conclusion.

Deliverable / service	Quantity / duration	Timing / acceptance

Exclusions and responsibilities outside coaching

For example, technical sign-off, employment decisions, treatment or formal assessment.

Basis: H1, R1, R2, R4 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD09

Coaching services agreement

2 / Roles, professional care and participation

WORKING COPY / Contracting parties; only relevant schedules to coachee / programme owner

REFERENCE

VERSION / DATE

1. Nature of the service

The provider will deliver the coaching services described in the completed schedule using reasonable professional care within the named coach's competence. Coaching supports development, reflection and workplace learning. It is not legal, medical or financial advice, clinical treatment, a formal employment procedure or a guarantee of a particular result.

2. Responsibilities

The coach is responsible for professional practice, scope, preparation and appropriate boundaries. The coachee retains responsibility for their choices and work actions. The purchaser and sponsor remain responsible for decisions, resources, duties and authorisations within their roles. Nothing in this wording excludes responsibilities that cannot lawfully be excluded.

3. Participation and changes of role

The parties will explain the purpose of coaching and the practical consequences of choosing or declining the service. A change from coaching to advice, assessment or another professional role will be made explicit and agreed through an appropriate process before the additional work begins.

4. Suitability and concerns

Either the coachee or the coach may raise a concern, request a pause or end the coaching relationship, subject to the agreed administrative and financial arrangements and applicable rights. The provider will consider competence limits, conflicts and referral needs rather than continue unsuitable work.

Agreed professional code and service-specific limits

State the code/version actually adopted and any internal-coach or manager-as-coach limits.

Local amendments / reviewed terms

Attach approved wording where needed; no claim of universal enforceability.

Basis: H1, R1, R2, R4 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / AGREE

CD09

Coaching services agreement

3 / Information, technology and intellectual property

WORKING COPY / Contracting parties; only relevant schedules to coachee / programme owner

REFERENCE

VERSION / DATE

5. Confidentiality and planned disclosure

The parties will protect information obtained through the service and follow the completed information-sharing protocol. The purchaser's funding does not itself permit access to private session notes or assessment material. Optional additional disclosure requires a defined purpose and appropriate authority. Information protections continue after the engagement ends.

6. Applicable duties and advice

Where law, a valid compulsory process or an urgent safety obligation may require disclosure, the responsible party will use the approved qualified route, establish the relevant basis and limit disclosure appropriately. The person concerned will be informed where lawful and safe. No promise of absolute secrecy or automatic legal privilege is made.

7. Records and digital services

Actual data roles, processing purposes, legal bases, recipients, transfers and record lifecycles will be recorded in the approved privacy notice and schedules. Recording, transcription, AI processing and observers are not enabled merely by signing this agreement; their use requires the separate decisions and permissions applicable to the proposed purpose.

8. Materials and work products

Existing intellectual property remains with its owner. Permitted use of provider materials and coachee-owned outputs will be specified below. No licence to reproduce protected tests, disclose employer information or publish a case is implied.

Protocol / notice / permitted-use references

Versions of CD11-CD16 as applicable; approved materials licence.

Third-party suppliers and local processing terms

Identify required processing agreements and transfer safeguards; not supplied by this specimen.

Basis: H1, R1, R2, R4 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / AGREE

CD09

Coaching services agreement

4 / Fees, scheduling and variation

WORKING COPY / Contracting parties; only relevant schedules to coachee / programme owner

REFERENCE

VERSION / DATE

Currency / total fee or rate

Applicable tax treatment / source

Charge / expense	Basis / quantity	Payment or approval terms

9. Scheduling and cancellation

The parties will arrange sessions and review meetings through the agreed contact route. Late arrival, cancellation, non-attendance, coach cancellation, rescheduling and refund treatment will follow the completed terms below. A cancellation charge is not evidence of coaching time delivered.

Actual cancellation, refund and contact terms

Notice windows, fees, illness/access considerations, provider cancellation and response expectations.

10. Changes and additional work

A requested change to scope, timing, recipient, technology or charges will be documented and approved by the affected parties before optional additional work begins. The previous agreement and reasons for change will be retained.

Invoices, purchase orders and expenses

Verified billing information; approval and payment dates; no private coaching content.

Basis: H1, R1, R2, R4 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / AGREE

CD09

Coaching services agreement

5 / Ending, disputes and approval

WORKING COPY / Contracting parties; only relevant schedules to coachee / programme owner

REFERENCE

VERSION / DATE

11. Ending and continuity

On ending or suspension, the parties will confirm the effective date, outstanding services, fees or refunds under the completed terms, appropriate continuity arrangements and the handling of records. A future engagement requires a defined purpose and a new or revised agreement.

12. Concerns and dispute resolution

The completed concerns procedure identifies an appropriate route independent of the issue where necessary. Good-faith resolution will not obstruct statutory rights, urgent remedies or applicable professional-body processes. Any mediation, court, arbitration or other forum must be locally reviewed and expressly agreed.

Jurisdiction, governing law and dispute route

Local counsel to approve; include any applicable consumer or employment protections.

Liability, insurance and other required local terms

Insert reviewed provisions; no blanket exclusion or fixed liability cap supplied.

Documents forming the agreement and precedence

List schedules and versions; settle contradictions before signing.

Provider signatory / role / date

Purchaser signatory / role / date

Coach acknowledgement / date

Other required approval / date

Before issue

Use an approved signing method. Typed names in these fields do not themselves create a verified digital signature. Provide each party with the final approved version.

Basis: H1, R1, R2, R4 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD10

Four-way coaching relationship agreement

Agree how coachee, coach, sponsor and programme owner will work together.

USE WHEN	Before substantive coaching; review at midpoint and after role changes.
OWNER	All four roles; programme owner coordinates the record
PERMITTED AUDIENCE	All named parties; private material excluded

COMPLETE THE DOCUMENT

- 01 Name the four responsibilities even if one person holds more than one role.
- 02 Co-create a work-related purpose and record legitimate differences.
- 03 Agree support, information, review and routes for concern or exit.
- 04 Ask each party to explain the agreement; settle mismatches before confirming it.

JUDGEMENT AND BOUNDARY

The agreement does not transfer private session ownership to a funder. Where a line manager is also the coach, explicitly state the limits of confidentiality and separate management decisions.

WORKED SITUATION / FICTIONAL

E-204: the coachee will rehearse and test clearer delegation, the coach will support inquiry, the sponsor will settle authority, and the programme owner will manage access and concerns. Progress summaries require the agreed release process.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R1, R2 | Original guidance and form. Core-route option.



6A / AGREE

CD10

Four-way coaching relationship agreement

1 / Shared purpose and four roles

WORKING COPY / All named parties; private material excluded

REFERENCE

VERSION / DATE

Engagement / version / date

Planned period / review dates

Shared developmental purpose

Use agreed work-related wording; keep different interests visible.

Coachee responsibilities and choices

Participation, focus, work practice, privacy and right to raise concerns.

Coach responsibilities and scope

Professional care, competence, inquiry, preparation, supervision and referral.

Sponsor commitments

Work opportunity, time, authority, feedback and respect for information boundaries.

Programme-owner responsibilities

Access, matching, administration, concerns, practitioner support and evaluation.

Overlapping or additional roles

Name who acts in each role; specify line-manager support and role-switch boundaries.

Basis: H1, R1, R2 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / AGREE

CD10

Four-way coaching relationship agreement

2 / Boundaries and informed agreement

WORKING COPY / All named parties; private material excluded

REFERENCE

VERSION / DATE

Information protocol

CD11 version; allowed progress, excluded private content and verified exception route.

Practical arrangements

Sessions, review meetings, contact, fees where relevant and adjustments.

Working style, assessment and digital choices

CD14-CD19 references; recording / AI not enabled by default.

Concern, pause, rematch and ending route

Named contacts and workable alternative; no-fault rematch where available.

Understanding checked / unresolved differences

Each party explains what they will receive, provide and not receive.

Coachee confirmation / date

Coach confirmation / date

Sponsor confirmation / date

Programme owner confirmation / date

Basis: H1, R1, R2 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD11

Information-sharing and access protocol

Make every planned information flow explicit, including what will not be shared.

USE WHEN	At contracting and before any new recipient or purpose.
OWNER	Coach with all parties and relevant data lead
PERMITTED AUDIENCE	The protocol is shared; underlying records retain their own restrictions

COMPLETE THE DOCUMENT

- 01 List each record type and legitimate recipient.
- 02 Record purpose, minimum content, frequency, route and authority.
- 03 Test a realistic sponsor request against the protocol.
- 04 Update the protocol before a new optional disclosure; handle lawful obligations separately.

JUDGEMENT AND BOUNDARY

Do not confuse permission to share a summary with permission to share its source notes. A privacy label is not a legal exemption from access or disclosure duties.

WORKED SITUATION / FICTIONAL

E-204: the programme owner receives dates and attendance; the sponsor receives agreed goal progress at midpoint and close. Raw assessment responses, private reflection and coach notes are excluded from routine reporting.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R1, R2, R5 | Original guidance and form. Core-route option.



6A / AGREE

CD11

Information-sharing and access protocol

Information flows

WORKING COPY / The protocol is shared; underlying records retain their own restrictions

REFERENCE

VERSION / DATE

Operating rule

No routine disclosure outside this protocol. Assess legal or urgent safety obligations through the approved route; record only the minimum disclosure needed.

Record / information	Recipient and purpose	Allowed content / exclusions	Timing / secure route
Attendance			
Goals and actions			
Progress summary			
Private session notes			
Assessment reports			
Supervision material			
Other authorised flow			

Authority and approvals

Name the agreement, specific permission or verified duty relied upon.

Queries, exceptions and review

Contacts, version and change trigger.

Basis: H1, R1, R2, R5 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD12

Coaching privacy notice

Explain what personal information is used, why, by whom and for how long.

USE WHEN	Provide before collection; refresh before a new processing purpose.
OWNER	Accountable data controller / privacy lead with coach
PERMITTED AUDIENCE	Coachee and other affected people in accessible language

COMPLETE THE DOCUMENT

- 01 Identify the actual controller and processors; do not assume the coach is always a processor.
- 02 Complete the notice for the service, location and technology used.
- 03 State the relevant purposes, legal bases, recipients, transfers, rights and retention rules.
- 04 Explain the notice and record delivery, not blanket consent to everything.

JUDGEMENT AND BOUNDARY

This is a localisation template, not a universal compliant notice. Participation consent, disclosure permission and the lawful basis for processing are different matters.

WORKED SITUATION / FICTIONAL

E-204 receives notice v1.0 before intake. It describes separate administration and coaching records, no default recording, the approved privacy contact and retention by record type. Acknowledgement is not treated as consent to marketing.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R9, R10, R11 | Original guidance and form. Select when relevant.



6A / AGREE

CD12

Coaching privacy notice

1 / Who uses information and why

WORKING COPY / Coachee and other affected people in accessible language

REFERENCE

VERSION / DATE

Localise before providing this notice

Replace the fields below with the actual arrangements and obtain the accountable privacy owner's approval. This notice explains processing; it is not blanket consent.

Controller legal name / contact

Privacy contact / representative where applicable

Service and data roles

State actual controller, processor or joint-controller arrangements; do not assume them.

Purpose	Data / source	Applicable lawful basis / condition

Recipients and international transfers

Categories or named recipients; hosting and transfer safeguards; how details can be obtained.

Automated tools or decisions

Explain actual use, human review and relevant consequences; otherwise state none.

Basis: H1, R9, R10, R11 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / AGREE

CD12

Coaching privacy notice

2 / Rights, lifecycle and contact

WORKING COPY / Coachee and other affected people in accessible language

REFERENCE

VERSION / DATE

Retention by record type

Approved period or criteria, trigger and exceptions; link CD57.

Information required and optional choices

Why necessary; consequence of not providing it; separate optional uses.

Rights available and how to exercise them

Applicable access, correction, deletion, restriction, objection, portability or withdrawal rights and limits.

Complaints / regulator and practical contact

Use the appropriate verified authority and accessible route.

Security and confidentiality explanation

Practical protection; do not promise absolute security or legal privilege.

Notice version / date approved

Provided to / date / method

Questions or access requirements

Record that the notice was supplied and explained; acknowledgement is not blanket consent.

Basis: H1, R9, R10, R11 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD13

Specific disclosure permission and release

Document a freely agreed, bounded disclosure to a named recipient.

USE WHEN	Before optional sharing outside an existing approved flow.
OWNER	Coachee / relevant data subject and disclosing coach
PERMITTED AUDIENCE	Only the permission record and approved content to authorised recipients

COMPLETE THE DOCUMENT

- 01 Show the precise content or version proposed for release.
- 02 State recipient, purpose, route, expiry and limits.
- 03 Explain refusal and withdrawal arrangements without pressure.
- 04 Record the decision, actual disclosure and any later withdrawal.

JUDGEMENT AND BOUNDARY

Not a substitute for a lawful basis or permission from other people mentioned. Withdrawal cannot always retrieve material already lawfully shared; explain this honestly.

WORKED SITUATION / FICTIONAL

E-204 approves progress summary v2 for the sponsor only. The approval excludes the private note and assessment report, and does not permit reuse for selection or public promotion.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1, R11 | Original guidance and form. Select when relevant.



6A / AGREE

CD13

Specific disclosure permission and release

One defined disclosure

WORKING COPY / Only the permission record and approved content to authorised recipients

REFERENCE

VERSION / DATE

Permission reference

Engagement / person reference

Exact information or attached version

Identify the file, page, passage or data; redact third-party information appropriately.

Named recipient

Specific purpose

Route, timing and onward-use limits

Secure method; one-off or specified period; no wider publication.

Decision

Restrictions, expiry and withdrawal route

What can still be stopped; how to raise a request.

Person confirming / date

Coach confirmation / date

Actual release and any withdrawal

Date, version, recipient verification and action taken.

Basis: H1, R1, R11 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD14

Remote coaching and contact arrangements

Agree a private, accessible and dependable way to meet remotely.

USE WHEN	Before online or telephone coaching; check when a participant travels.
OWNER	Coach and coachee
PERMITTED AUDIENCE	Coach/coachee; logistics only to administrator

COMPLETE THE DOCUMENT

- 01 Agree the platform, location privacy and discreet calendar wording.
- 02 Decide what happens if the connection fails or a third party enters.
- 03 Set between-session channels, response expectations and emergency limitations.
- 04 Review location-dependent support and data arrangements before cross-border delivery.

JUDGEMENT AND BOUNDARY

An online room is not automatically private. Do not imply monitoring or emergency availability between sessions.

WORKED SITUATION / FICTIONAL

E-204 uses neutral calendar titles, a private room and an approved video service with recording off. If disconnected, the coach calls the agreed number; ordinary email is not an emergency channel.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R1, R5, R8 | Original guidance and form. Select when relevant.



6A / AGREE

CD14

Remote coaching and contact arrangements

Remote service plan

WORKING COPY / Coach/coachee; logistics only to administrator

REFERENCE

VERSION / DATE

Platform / approved version

Normal location(s) / time zone

Privacy and accessibility checks

Overhearing, screen sharing, captions, shared devices and adjustments.

Connection failure and interruption plan

Who calls whom; when to pause or reschedule.

Contact channels and response window

Business days, absence cover and excluded channels.

Immediate concern and local support route

Appropriate local route; necessity for any location / contact information.

- ☐ Recording and transcription settings checked
- ☐ Calendar and invitation wording agreed
- ☐ Current location changes will be discussed
- ☐ No crisis or continuous monitoring service implied

Coachee agreement / date

Coach agreement / review date

Basis: H1, R1, R5, R8 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD15

Recording, observation and transcript permission

Separate permission for an observation or recording from permission to receive coaching.

USE WHEN	Only when there is a specific justified purpose.
OWNER	Coach, coachee and any other identifiable participants
PERMITTED AUDIENCE	Named observer / assessor only as agreed

COMPLETE THE DOCUMENT

- 01 Explain the purpose, people, medium and exact intended use.
- 02 Offer a workable non-recorded or unobserved route where possible.
- 03 Obtain each relevant person's decision before capture begins.
- 04 Track creation, access, transfer, retention and deletion against the permission.

JUDGEMENT AND BOUNDARY

No pre-ticked choices. Permission for a live observer is not permission for recording, transcription, AI processing or training-data use. Do not promise withdrawal can undo a completed external assessment.

WORKED SITUATION / FICTIONAL

E-204 declines an optional training recording. Coaching continues unchanged. A different observed-practice arrangement would require a new, clearly explained request.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R1, R2, R8 | Original guidance and form. Select when relevant.



6A / AGREE

CD15

Recording, observation and transcript permission

Specific optional use

WORKING COPY / Named observer / assessor only as agreed

REFERENCE

VERSION / DATE

Purpose, session and people involved

Training, supervision, assessment or another defined reason.

Live observation

Select / not yet decided

Audio / video recording

Select / not yet decided

Human transcription

Select / not yet decided

Named recipients and use restrictions

No AI processing under this permission; use CD16 separately.

Alternative, withdrawal and effect of refusal

Specify the latest withdrawal point for any external submission.

Participant decision / date

Coach confirmation / date

Basis: H1, R1, R2, R8 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / AGREE

CD15

Recording, observation and transcript permission

Record lifecycle

WORKING COPY / Named observer / assessor only as agreed

REFERENCE

VERSION / DATE

File reference / created date

Custodian / approved storage

Access and external transfer

Named recipients; verified route; permission checked.

Deletion / review trigger

External recipient retention

Withdrawal or correction request

Request, timing, advice and what could be stopped.

Disposal confirmation

Copies, transcripts, downloads and backups; state limits accurately.

Actioned by / date

Verification / evidence reference

Basis: H1, R1, R2, R8 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD16

AI and digital-tool decision record

Assess a proposed digital use and record the coachee's informed choice where required.

USE WHEN	Before using a new AI or data-processing feature; repeat after material change.
OWNER	Coach with accountable privacy / technology approver
PERMITTED AUDIENCE	Restricted decision record; clear explanation to coachee

COMPLETE THE DOCUMENT

- 01 Identify the tool and task; begin with necessity and a non-AI alternative.
- 02 Check data categories, recipients, retention, training use, hosting and supplier terms.
- 03 Separate organisational approval, lawful basis and coachee choice.
- 04 Define human review, error correction, stop conditions and deletion; keep sensitive content out until approved.

JUDGEMENT AND BOUNDARY

No automated consequential judgement, hidden recording or unreviewed sponsor report. Do not paste identifiable case notes into a public tool merely because the coachee likes the idea.

WORKED SITUATION / FICTIONAL

E-204 permits a human-written action summary but no AI transcription. An approved scheduling tool receives only logistical data; private reflections remain outside it.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R1, R8, R11 | Original guidance and form. Select when relevant.



6A / AGREE

CD16

AI and digital-tool decision record

Tool and risk review

WORKING COPY / Restricted decision record; clear explanation to coachee

REFERENCE

VERSION / DATE

Product / version / supplier

Specific function / date reviewed

Task and non-AI alternative

What useful purpose requires the proposed data?

Data path

Input, output, hosting, subprocessors, transfers and access.

Supplier terms and controls checked

Training use, deletion, security, accessibility and human oversight.

Approval and applicable requirements

Named privacy / technology reviewer; basis; outstanding conditions.

Operational decision

Select / not yet decided

Basis: H1, R1, R8, R11 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / AGREE

CD16

AI and digital-tool decision record

Client explanation and use log

WORKING COPY / Restricted decision record; clear explanation to coachee

REFERENCE

VERSION / DATE

Plain-language explanation supplied

What the tool does; data involved; who sees output; limitations.

Choice and workable alternative

Record the person's decision and effect of refusal; no blanket future permission.

Decision / date

Approved scope / expiry

Use date / task	Data reference	Human verification	Corrections / deletion

Incident, change or withdrawal

Stop action; update CD20 / CD59 if relevant.

Basis: H1, R1, R8, R11 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD17

Accessibility and participation adjustment plan

Agree practical adjustments that make participation possible without unnecessary disclosure.

USE WHEN	At intake or whenever an access need changes.
OWNER	Coachee with coach / authorised support contact
PERMITTED AUDIENCE	Only the people implementing agreed adjustments

COMPLETE THE DOCUMENT

- 01 Ask what would make the coaching format workable.
- 02 Record the functional need, not an unnecessary diagnosis.
- 03 Agree adjustments, owner and a trial review.
- 04 Check any impact on assessment standardisation with the authorised test user.

JUDGEMENT AND BOUNDARY

Do not interpret language, disability, caring responsibilities or a need for breaks as low motivation. Ask before involving interpreters or support people.

WORKED SITUATION / FICTIONAL

E-204 requests written preparation prompts and a short pause to formulate responses. The coach agrees a trial without inferring a fixed learning style or requiring medical evidence.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R1, R13 | Original guidance and form. Select when relevant.



6A / AGREE

CD17

Accessibility and participation adjustment plan

Participation arrangements

WORKING COPY / Only the people implementing agreed adjustments

REFERENCE

VERSION / DATE

Practical need or preference

The person may describe what helps without disclosing a diagnosis.

Adjustment	Owner / resources	When available	Review / effectiveness

Interpreter, assistant or platform arrangements

Role, confidentiality, competence and permission.

Assessment implications where relevant

Authorised advice on adaptation; avoid unapproved score comparisons.

Agreed by / date

Next review / trigger

Basis: H1, R1, R13 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD18

Session schedule and administrative contact plan

Create a usable schedule and apply the agreed cancellation and communication terms consistently.

USE WHEN	At set-up; update after every change.
OWNER	Coach / administrator with coachee
PERMITTED AUDIENCE	Logistics to authorised administrative roles only

COMPLETE THE DOCUMENT

- 01 Copy the actual approved terms from the agreement.
- 02 Set proposed dates, mode and review points.
- 03 Record changes and service implications without interpreting personal motives.
- 04 Confirm updates through the safe agreed channel.

JUDGEMENT AND BOUNDARY

A missed meeting may have many explanations. Record an agreed fee decision separately from a judgement about commitment.

WORKED SITUATION / FICTIONAL

E-204 agrees six planned meetings. Session three is rescheduled due to a business-critical event; the revised date and any charge decision follow the contract rather than an improvised penalty.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1, R4 | Original guidance and form. Select when relevant.



6A / AGREE

CD18

Session schedule and administrative contact plan

Schedule and communication

WORKING COPY / Logistics to authorised administrative roles only

REFERENCE

VERSION / DATE

Agreement reference / version

Safe contact / calendar wording

Session / review	Date / time zone	Mode / location	Confirmation / change

Cancellation, late arrival and rescheduling terms

Use the agreed terms; include coach cancellation and refund treatment.

Between-session contact and absence

Response window, planned leave and backup contact.

Basis: H1, R1, R4 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD19

Working relationship and session boundaries

Make preferences about challenge, feedback, pace and scope discussable.

USE WHEN	At the beginning and whenever the working relationship needs attention.
OWNER	Coach and coachee
PERMITTED AUDIENCE	Shared relationship record; no routine sponsor access

COMPLETE THE DOCUMENT

- 01 Invite the coachee's preferences and explain the coach's role.
- 02 Agree how observations, questions and feedback will be offered.
- 03 Discuss how either person can pause, disagree or change the approach.
- 04 Record practical decisions without prescribing personal disclosure.

JUDGEMENT AND BOUNDARY

Consent to coaching is not permanent permission for any exercise. Silence or compliance should not be treated as endorsement.

WORKED SITUATION / FICTIONAL

E-204 welcomes direct work-focused challenge but wants the coach to distinguish observation from interpretation. Either party can pause an exercise and revisit its usefulness.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1, R3 | Original guidance and form. Select when relevant.



6A / AGREE

CD19

Working relationship and session boundaries

How we will work

WORKING COPY / Shared relationship record; no routine sponsor access

REFERENCE

VERSION / DATE

What helps me think

Pace, silence, preparation, language or use of visual tools.

Feedback and challenge

How to offer, check and correct an observation.

Topics, methods and role boundaries

What is in scope; how a change will be discussed.

Pause, disagreement and repair

A practical phrase or signal; route if concerns persist.

Between-session responsibility

Assignments are agreed, not imposed; limits on contact.

Coachee confirmation

Coach confirmation / review date

Basis: H1, R1, R3 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / AGREE

CD20

Re-contracting and scope-change record

Keep purpose, roles, costs and information permissions current when circumstances change.

USE WHEN	New role, sponsor, objective, risk, tool, scope or proposed extension.
OWNER	Coach and affected contracting parties
PERMITTED AUDIENCE	Relevant parties; separate private reasons from shareable change

COMPLETE THE DOCUMENT

- 01 Reference the current agreement and specify the trigger.
- 02 Identify exactly which terms, goals or permissions change.
- 03 Check fit, conflicts, access, cost and other affected people.
- 04 Approve the change before optional new work begins and retain the prior version.

JUDGEMENT AND BOUNDARY

Do not backdate permission or overwrite the original goal to manufacture success. A new formal assessment may require a separate engagement.

WORKED SITUATION / FICTIONAL

E-204 gains a new sponsor. The existing information limits remain until all parties review them; the coach does not forward historic private records to help the new sponsor catch up.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1, R2 | Original guidance and form. Core-route option.



6A / AGREE

CD20

Re-contracting and scope-change record

Change and agreement

WORKING COPY / Relevant parties; separate private reasons from shareable change

REFERENCE

VERSION / DATE

Current agreement / version

Change requested by / date

Trigger and proposed change

Purpose, roles, scope, dates, fees, technology or information.

What remains unchanged

Carry forward boundaries explicitly.

Implications and checks

Suitability, authority, conflicts, access, cost, retention and third parties.

Approved wording / new terms

Use exact replacement clauses or attach a version-controlled amendment.

Decision

Select / not yet decided

Approvals / dates

Effective date / new version

Communication and next review

Who receives what; preserve the superseded version.

Basis: H1, R1, R2 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



03

Assess

Record relevant evidence, not a verdict.

Use proportionate work evidence, a coachee-owned goal and a clear baseline. Select an assessment only when it adds relevant information and its use is authorised.

8 DOCUMENTS / CD21-CD28

[Open the section document directory >](#)

The document directory

Select a document. CD identifiers are new pack references; they do not replace the T and X tool identifiers.

ID	Document	Guide	Form
CD21	Coaching goals and baseline record	69	70
CD22	Work-context and systemic-conditions record	71	72
CD23	Assessment selection and participant authorisation	73	74-75
CD24	Assessment debrief and development decision	76	77
CD25	Stakeholder feedback invitation	78	79
CD26	Stakeholder feedback interview note	80	81
CD27	Coaching evidence register	82	83
CD28	Coaching development plan	84	85

SELECT. COMPLETE. CHECK. FILE.

Keep the original blank master. Save an authorised working copy and share only the information agreed for that recipient.

CD21

Coaching goals and baseline record

Make a developmental goal specific enough to review against credible work evidence.

USE WHEN	After contracting; refine once context is understood.
OWNER	Coachee and coach
PERMITTED AUDIENCE	Shared goal record; sponsor receives only agreed version

COMPLETE THE DOCUMENT

- 01 State one behaviour and the relevant work situation.
- 02 Describe existing evidence and what is not known.
- 03 Define meaningful expected change before observing results.
- 04 Separate behaviour, outcome and other influences; agree the review source and date.

JUDGEMENT AND BOUNDARY

Confidence, preference and work performance are different. No overall psychometric score or causal business claim is produced by this form.

WORKED SITUATION / FICTIONAL

E-204 goal G1: agree authority and checkpoints before routine recommendations. Baseline: four selected reviews show two with explicit checkpoints. This small sample is descriptive, not a stable performance estimate.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R3, R14 | Original guidance and form. Core-route option.



6A / ASSESS

CD21

Coaching goals and baseline record

One goal and its evidence

WORKING COPY / Shared goal record; sponsor receives only agreed version

REFERENCE

VERSION / DATE

Goal ID / version

Defined on / review date

Coachee-owned goal and work situation

Observable practice; avoid outcomes controlled wholly by others.

Baseline evidence

Source, period, eligible opportunities, missing observations and limits.

Expected change / behavioural anchor

Define before the review; use examples of what would count.

Review method and permissions

Who observes; what record; how often; who may receive it.

Context, support and alternative explanations

Role authority, workload, systems or other development.

Coachee agreement / date

Coach check / next step

Basis: H1, R3, R14 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

CD22

Work-context and systemic-conditions record

Avoid treating an organisational barrier as an individual shortcoming.

USE WHEN	At assessment and when an experiment exposes a wider issue.
OWNER	Coach and coachee
PERMITTED AUDIENCE	Private working record; only agreed system actions shared

COMPLETE THE DOCUMENT

- 01** Explore a concrete episode rather than a broad label.
- 02** Distinguish person, role, relationships and operating conditions.
- 03** Identify what the coachee can practise and what another owner must decide.
- 04** Record a provisional explanation and an alternative.

JUDGEMENT AND BOUNDARY

This is a working formulation, not clinical diagnosis or a complete organisational diagnostic.

WORKED SITUATION / FICTIONAL

E-204 can frame options, but material scope approval is unclear. A behavioural experiment and a sponsor authority decision proceed separately.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R3 | Original guidance and form. Select when relevant.



6A / ASSESS

CD22

Work-context and systemic-conditions record

Person, role and system

WORKING COPY / Private working record; only agreed system actions shared

REFERENCE

VERSION / DATE

Episode and current question

What happened; whose account; what was observed.

Relevant strengths / capability

Role authority / obligations

Relationships and work conditions

Information, resources, incentives, workload and dependencies.

Working explanation and contrary evidence

A hypothesis open to revision; include another plausible account.

Coaching action versus system action

Name the accountable owner for each.

Evidence that would change the account

What to explore next; permission required.

Basis: H1, R3 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

CD23

Assessment selection and participant authorisation

Document why an assessment is justified and how its evidence will be used responsibly.

USE WHEN	Before purchasing, administering or repeating an instrument.
OWNER	Qualified test user with coach and participant
PERMITTED AUDIENCE	Authorised assessment record; controlled report access

COMPLETE THE DOCUMENT

- 01 Begin with a specific unanswered developmental question.
- 02 Check instrument version, intended use, evidence, qualifications, language and adjustments.
- 03 Explain time, feedback, data handling and alternatives to the participant.
- 04 Record administration conditions and any limits before interpreting results.

JUDGEMENT AND BOUNDARY

The catalogue is not a technical manual. Do not reproduce item banks, infer suitability from a brand name, or reuse development evidence for selection without a separately justified process.

WORKED SITUATION / FICTIONAL

E-204 considers a Leadership 360 report to examine experienced meeting behaviour. The coach checks purpose and privacy arrangements; a personality battery is not added simply because it is available.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R13 | Original guidance and form. Select when relevant.



6A / ASSESS

CD23

Assessment selection and participant authorisation

Selection decision

WORKING COPY / Authorised assessment record; controlled report access

REFERENCE

VERSION / DATE

Developmental question / goal ID

Instrument / version / publisher

Why this evidence is needed

What is already known; non-test alternatives.

Technical and competence checks

Intended use; language/population evidence; limitations; authorised user.

Administration and adjustment plan

Timing, access, accommodations and standardisation implications.

Reports, recipients and feedback

Secure storage; report versions; rater protections; debrief plan.

Selection status

Select / not yet decided

Basis: H1, R13 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / ASSESS

CD23

Assessment selection and participant authorisation

Participant information and administration

WORKING COPY / Authorised assessment record; controlled report access

REFERENCE

VERSION / DATE

Information explained before participation

Purpose, demands, alternatives, access to results and relevant limits.

Participant decision

Select / not yet decided

Decision date / confirmation

Administrator / qualifications reference

Administration record

Date, mode, conditions, interruptions and deviations.

Report reference and debrief appointment

No item responses copied into this operational form.

Interpretation limits and follow-up

What the result does not establish; next authorised action.

Basis: H1, R13 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

CD24

Assessment debrief and development decision

Turn an authorised report into a contextual development conversation and a bounded next step.

USE WHEN	After assessment; before reports influence action.
OWNER	Qualified practitioner with coachee
PERMITTED AUDIENCE	Coach/coachee; agreed summary only to others

COMPLETE THE DOCUMENT

- 01 Check the person's understanding and immediate response.
- 02 Separate the evidence type from the interpretation.
- 03 Compare findings with work examples and counterexamples.
- 04 Agree a practice experiment and record limits, permissions and review.

JUDGEMENT AND BOUNDARY

No rater identification, fixed-type labelling or inference that a test explains every difficulty. Keep proprietary reports in their approved environment.

WORKED SITUATION / FICTIONAL

E-204 notices that peers experience decisions as already settled. They choose a concerns-first meeting opening and retain the possibility that different groups see different situations.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R13 | Original guidance and form. Select when relevant.



6A / ASSESS

CD24

Assessment debrief and development decision

Report to action

WORKING COPY / Coach/coachee; agreed summary only to others

REFERENCE

VERSION / DATE

Instrument / report version

Debrief date / practitioner

Participant response and checked understanding

What fits, does not fit or needs clarification.

Relevant findings and evidence type

Preference, judgement, self-report, observed behaviour or reasoning.

Work examples and alternative interpretations

Do not treat a score as the whole person.

Chosen development action

Behaviour, situation, support and permissions.

Review evidence and information release

Use CD13 where additional sharing is optional.

Limits or matters requiring further help

Record the next qualified route where necessary.

Basis: H1, R13 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ASSESS

CD25

Stakeholder feedback invitation

Request focused, permission-based observations from a colleague.

USE WHEN	When another perspective will help an agreed goal.
OWNER	Coachee / coach under agreed protocol
PERMITTED AUDIENCE	Named respondent; stated report audience

COMPLETE THE DOCUMENT

- 01** Agree the purpose and invite rather than compel participation.
- 02** Explain whether the response is identifiable, confidential or aggregated.
- 03** Ask for concrete observations and allow not observed.
- 04** Explain access, retention and the appropriate route for formal concerns.

JUDGEMENT AND BOUNDARY

Do not promise anonymity in a one-to-one interview. A small group and distinctive comments can reveal identity.

WORKED SITUATION / FICTIONAL

E-204 invites a colleague to comment on two review meetings. The invitation states that the coachee will see the response and that declining does not need explanation.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R11, R13 | Original guidance and form. Select when relevant.



6A / ASSESS

CD25

Stakeholder feedback invitation

Invitation to contribute

WORKING COPY / Named respondent; stated report audience

REFERENCE

VERSION / DATE

To / respondent

From / date

Purpose and agreed goal

Explain the developmental use, not a selection decision.

Suggested invitation wording

Your perspective may help with the specific work practice described above. Participation is optional. Please comment only on situations you have observed. You may mark an area not observed or leave it unanswered. The information-sharing arrangements below explain who will see your response.

Questions and observation window

Use a small number of work-specific questions; do not request a personality judgement.

Who will see what

Identifiable response or approved aggregation; restrictions; no false anonymity.

Return method / due date

Privacy / concern contact

Privacy notice and retention information

Provide or link the relevant notice before collecting the response.

Basis: H1, R11, R13 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ASSESS

CD26

Stakeholder feedback interview note

Capture observations fairly while preserving source, context and limits.

USE WHEN	During an agreed feedback conversation.
OWNER	Coach / authorised interviewer
PERMITTED AUDIENCE	As declared to respondent before collection

COMPLETE THE DOCUMENT

- 01 Confirm purpose, audience and permission before starting.
- 02 Record the episode, observed action and experienced effect.
- 03 Separate direct observation from inference or hearsay.
- 04 Check the summary and record any restriction or correction.

JUDGEMENT AND BOUNDARY

Coaching feedback is not a substitute for investigating misconduct. Do not circulate untested allegations in a development summary.

WORKED SITUATION / FICTIONAL

A fictional colleague observed E-204 opening a meeting with a preferred answer. They could not comment on other meetings. The note retains that limit rather than reporting a permanent leadership trait.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R5, R13 | Original guidance and form. Select when relevant.



6A / ASSESS

CD26

Stakeholder feedback interview note

Observed behaviour and context

WORKING COPY / As declared to respondent before collection

REFERENCE

VERSION / DATE

Interview date / source code

Observation period / relationship

Permission and audience confirmed

What was explained; any restrictions.

Specific episode and observed behaviour

Use accurate words or attributed paraphrase, not a diagnostic label.

Effect experienced by the respondent

Distinguish reported effect from verified outcome.

Other examples, exceptions and not observed

Do not fill gaps with assumptions.

Summary checked and corrections

Respondent confirmation where agreed.

Next step and controlled record location

Do not broaden the use beyond the stated purpose.

Basis: H1, R5, R13 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

CD27

Coaching evidence register

Keep claims connected to evidence sources, consent and limitations.

USE WHEN	At baseline and during progress review.
OWNER	Coach / coachee as agreed
PERMITTED AUDIENCE	Shared evidence references; restricted source files remain separate

COMPLETE THE DOCUMENT

- 01 Assign each record a reference and describe the claim it may support.
- 02 Record source, date, context and whether it is self-report or corroborated.
- 03 Record missing evidence and plausible alternatives.
- 04 Use references in reviews instead of attaching everything.

JUDGEMENT AND BOUNDARY

This register does not make evidence valid or anonymous. Keep protected test responses and third-party confidential documents in approved storage.

WORKED SITUATION / FICTIONAL

E-204 E1 is a meeting agenda, E2 a colleague's agreed observation, and E3 the coachee's reflection. The review distinguishes the three rather than presenting all as independent confirmation.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R3, R13, R14 | Original guidance and form. Select when relevant.



6A / ASSESS

CD27

Coaching evidence register

Evidence and limitations

WORKING COPY / Shared evidence references; restricted source files remain separate

REFERENCE

VERSION / DATE

ID / date	Goal / claim	Source and context	Limits / permission / location

Important missing evidence

What remains unknown and whether it matters for the decision.

Evidence to seek next

Owner, permission, proportionality and review date.

Basis: H1, R3, R13, R14 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ASSESS

CD28

Coaching development plan

Connect a small number of goals with practice, support and review.

USE WHEN	After baseline and whenever priorities change.
OWNER	Coachee owns the plan; coach supports
PERMITTED AUDIENCE	Coach/coachee; agreed goals and support actions only to sponsor

COMPLETE THE DOCUMENT

- 01 Choose a manageable set of priorities and retain the coachee's wording.
- 02 Link each priority to baseline and expected practice.
- 03 Name supporting people, work opportunities and boundaries.
- 04 Agree review dates and criteria for adaptation or closure.

JUDGEMENT AND BOUNDARY

This is a developmental plan, not a promotion promise or formal performance-improvement notice. Separate any employment process.

WORKED SITUATION / FICTIONAL

E-204 chooses two priorities: clearer delegation agreements and a concerns-first meeting opening. A sponsor action on decision rights supports both.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R3 | Original guidance and form. Core-route option.



6A / ASSESS

CD28

Coaching development plan

Development priorities

WORKING COPY / Coach/coachee; agreed goals and support actions only to sponsor

REFERENCE

VERSION / DATE

Plan version / agreed date

Review date / review participants

Goal / baseline ref	Practice and work opportunity	Support / owner	Review evidence / date

Conditions, boundaries and trade-offs

What needs approval; what must not be displaced.

Coachee choice and sponsor support

Record any differences; share only agreed content.

Change and completion criteria

What would lead to revising, pausing or ending a priority.

Basis: H1, R3 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



04

Activate

Give the conversation a dependable record.

Prepare the session, record only what is useful and keep private notes separate from a shared account. Attendance is an administrative fact, not an assessment of capability.

8 DOCUMENTS / CD29-CD36

[Open the section document directory >](#)



6A / ACTIVATE

DOCUMENT INDEX / ACTIVATE

The document directory

Select a document. CD identifiers are new pack references; they do not replace the T and X tool identifiers.

ID	Document	Guide	Form
CD29	Coachee pre-session preparation	88	89
CD30	Session agenda and opening agreement	90	91
CD31	Confidential coach session file note	92	93-94
CD32	Shared session summary	95	96
CD33	Coachee learning and reflection record	97	98
CD34	Coach post-session reflective note	99	100
CD35	Session attendance and coaching-hours log	101	102
CD36	Missed-session and contact record	103	104

SELECT. COMPLETE. CHECK. FILE.

Keep the original blank master. Save an authorised working copy and share only the information agreed for that recipient.

Source architecture H1-H2 | Original CD document family / operational selection is not a mandatory checklist.

6A / ACTIVATE

CD29

Coachee pre-session preparation

Help the coachee arrive with a useful focus without creating an administrative burden.

USE WHEN	Optional before a session; can be completed verbally.
OWNER	Coachee
PERMITTED AUDIENCE	Coachee chooses whether to share with coach

COMPLETE THE DOCUMENT

- 01 Invite a brief update on the previous experiment.
- 02 Ask for the current issue and one concrete episode.
- 03 Let the coachee choose what is important today.
- 04 Use it as an opening, not a test of preparation or commitment.

JUDGEMENT AND BOUNDARY

Non-completion is not evidence of resistance. A conversation may be more accessible than a written form.

WORKED SITUATION / FICTIONAL

E-204 brings a delegation that was taken back after a missing risk update. They want to examine the point at which support became takeover.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R6 | Original guidance and form. Select when relevant.



6A / ACTIVATE

CD29

Coachee pre-session preparation

Prepare for the conversation

WORKING COPY / Coachee chooses whether to share with coach

REFERENCE

VERSION / DATE

Session / planned date

Goal reference (optional)

What has happened since we last met?

One or two work examples; include what did not happen.

What I would like to think about today

What would make the session useful?

What I tried and what I noticed

Separate action, result and explanation.

Support, constraints or changed circumstances

Any agreement or access arrangement to revisit.

What I want my coach to know or ask about

Only what you choose to share.

My first question for today

Preparation can be brief.

Basis: H1, R6 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ACTIVATE

CD30

Session agenda and opening agreement

Agree the purpose and boundaries of this conversation rather than follow a rigid script.

USE WHEN	At each session; particularly when focus changes.
OWNER	Coach and coachee
PERMITTED AUDIENCE	Shared session record

COMPLETE THE DOCUMENT

- 01 Check immediate context and changes to the agreement.
- 02 Agree a useful session outcome in the coachee's terms.
- 03 Choose a proportionate approach and confirm willingness.
- 04 Reserve time to review learning and any owned next step.

JUDGEMENT AND BOUNDARY

A session agenda is provisional. Do not force an action or deep exploration to satisfy the form.

WORKED SITUATION / FICTIONAL

E-204 agrees to examine one takeover episode and rehearse a different opening. The aim is clearer choice, not a promise to stop all intervention.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R3, R6 | Original guidance and form. Select when relevant.



6A / ACTIVATE

CD30

Session agenda and opening agreement

Today's agreement

WORKING COPY / Shared session record

REFERENCE

VERSION / DATE

Session date / number

Time available / mode

Current focus and desired session outcome

Use the coachee's wording.

Changes to context or agreement

Role, sponsor, privacy, capacity or purpose.

Approach and permission

Conversation, reflection, rehearsal or selected activity.

Time / sequence	Focus	Useful output

How we will close and check usefulness

Learning, choice, support or further reflection.

Basis: H1, R3, R6 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ACTIVATE

CD31

Confidential coach session file note

Maintain a concise, factual record of the coaching work and necessary follow-up.

USE WHEN	During or promptly after a session; preserve any later amendment history.
OWNER	Coach
PERMITTED AUDIENCE	Restricted coach file; not routine sponsor material

COMPLETE THE DOCUMENT

- Record session logistics and the agreed focus.
- Distinguish the coachee's account, direct observation and your provisional interpretation.
- Record the intervention, the coachee's response and chosen next step.
- Limit the note to useful information; store separately from the shared summary and keep an amendment trail.

JUDGEMENT AND BOUNDARY

Private does not mean legally privileged or exempt from an applicable access request. Avoid diagnoses, speculation, verbatim transcripts and unnecessary third-party detail.

WORKED SITUATION / FICTIONAL

E-204 reported taking back a draft after a missing risk update. The coach explored what authority had been delegated and rehearsed a clarification question. The record does not label the coachee controlling or attribute motives to colleagues.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R1, R5, R9 | Original guidance and form. Core-route option.



6A / ACTIVATE

CD31

Confidential coach session file note

Session evidence and learning

WORKING COPY / Restricted coach file; not routine sponsor material

REFERENCE

VERSION / DATE

Session date / number

Coach / mode / actual minutes

Agreed focus and context change

Cross-reference goal and current agreement.

Coachee's account of the work episode

Attribute the account; use only necessary detail.

Direct observations and checked meaning

What the coach noticed; corrections or uncertainties.

Coaching intervention and response

Method used, agreement and the coachee's response.

Learning or decision in the coachee's words

Do not present your interpretation as their conclusion.

Provisional hypothesis / alternative (only if useful)

Label clearly; do not diagnose.

Basis: H1, R1, R5, R9 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / ACTIVATE

CD31

Confidential coach session file note

Actions, boundaries and audit trail

WORKING COPY / Restricted coach file; not routine sponsor material

REFERENCE

VERSION / DATE

Chosen next step or deliberate reflection

Action, owner, work opportunity and review.

Support / authority needed outside coaching

Agree what can be raised and with whom.

Boundary, concern or referral follow-up

Reference a separate restricted record; no unnecessary duplication.

What may be included in the shared summary

Use CD32; permission is not automatic.

Next meeting / preparation

Note completed by / date

Amendment record

Date, author, correction and reason; preserve the original entry.

File handling

Store in the approved restricted location under CD08 / CD57. Keep administration and sponsor reporting separate. Use the editable Word version or an approved continuation record if this space is insufficient.

Basis: H1, R1, R5, R9 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ACTIVATE

CD32

Shared session summary

Provide a brief record the coachee can use without disclosing the coach's private process notes.

USE WHEN	At the end of a session or soon afterwards.
OWNER	Coachee and coach
PERMITTED AUDIENCE	Coachee; another recipient only through the agreed release route

COMPLETE THE DOCUMENT

- 01 Invite the coachee to name their useful learning.
- 02 Summarise the chosen action or reflection and supporting conditions.
- 03 Check the wording and explicitly identify permitted recipients.
- 04 Send only this summary, not the complete case file.

JUDGEMENT AND BOUNDARY

A shared summary is still personal information. It is not automatically a sponsor report.

WORKED SITUATION / FICTIONAL

E-204 summary: clarify escalation conditions with the task owner, then test one checkpoint rather than repeated informal checking. The summary omits the coach's hypotheses and third-party detail.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R5, R6 | Original guidance and form. Core-route option.



6A / ACTIVATE

CD32

Shared session summary

What to carry forward

WORKING COPY / Coachee; another recipient only through the agreed release route

REFERENCE

VERSION / DATE

Session date / number

Prepared with / version

Focus we worked on

Only the level of detail needed for continued development.

Learning the coachee wishes to retain

In their own words or a checked paraphrase.

Chosen action or reflection

Owner, timing and practical opportunity.

Support, limits and review evidence

What needs approval or another person's participation.

Next session / preparation

A useful question or evidence to bring.

Coachee wording checked / date

Permitted recipient(s) / release reference

Basis: H1, R5, R6 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ACTIVATE

CD33

Coachee learning and reflection record

Give the coachee a private place to record insight and work experience between sessions.

USE WHEN	Optional during the engagement and after closure.
OWNER	Coachee
PERMITTED AUDIENCE	Private to coachee unless they choose otherwise

COMPLETE THE DOCUMENT

- 01 Let the coachee decide what to record.
- 02 Encourage concrete experience and checked interpretation.
- 03 Record useful learning without requiring a positive story.
- 04 Agree whether any selected part will be brought to coaching.

JUDGEMENT AND BOUNDARY

The employer or coach does not automatically own this reflection. Do not make disclosure a condition of being regarded as engaged.

WORKED SITUATION / FICTIONAL

E-204 notes that pausing before answering felt uncomfortable, yet allowed a specialist to raise a genuine missing assumption. The private record includes uncertainty as well as progress.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R3 | Original guidance and form. Select when relevant.



6A / ACTIVATE

CD33

Coachee learning and reflection record

My learning record

WORKING COPY / Private to coachee unless they choose otherwise

REFERENCE

VERSION / DATE

Date / episode

Related goal (optional)

What happened

The situation and actions I can describe.

How I interpreted it

My account, not necessarily the only account.

What I learned or now question

Include evidence that challenges an earlier view.

What I may try or explore next

Action is optional; reflection can be useful.

What I choose to discuss with my coach

I may keep other material private.

Later review

What changed in understanding or practice?

Basis: H1, R3 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ACTIVATE

CD34

Coach post-session reflective note

Support professional learning without turning reflection into a second client dossier.

USE WHEN	After selected sessions; use for supervision when relevant.
OWNER	Coach
PERMITTED AUDIENCE	Restricted professional reflection; de-identify before consultation

COMPLETE THE DOCUMENT

- 01 Choose a specific moment in your own practice.
- 02 Separate your observation from what you inferred about the client.
- 03 Consider an alternative intervention and your own influence.
- 04 Name a learning action or supervision question and keep client identifiers out where unnecessary.

JUDGEMENT AND BOUNDARY

De-identification is more than removing a name. Reflection containing identifiable personal data still needs appropriate protection.

WORKED SITUATION / FICTIONAL

The fictional coach notices that they moved to an action plan before E-204 had clarified the decision. Their learning task is to check meaning before structuring a rehearsal.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R6, R15 | Original guidance and form. Select when relevant.



6A / ACTIVATE

CD34

Coach post-session reflective note

Reflect on the practice

WORKING COPY / Restricted professional reflection; de-identify before consultation

REFERENCE

VERSION / DATE

Reflection date

Session reference / de-identification check

Moment selected

Focus on the coach's intervention and the available evidence.

What I did and what I noticed

Avoid unsupported claims about inner states.

My assumptions, reactions or competing responsibilities

What may have shaped the work?

Alternative approach and learning

What might I try differently and why?

Supervision question / learning action

Use CD54 if consultation is needed.

How I will check the change in my practice

Evidence, feedback and review date.

Basis: H1, R6, R15 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ACTIVATE

CD35

Session attendance and coaching-hours log

Track service delivery and actual coaching time without disclosing content.

USE WHEN	After each session; reconcile at review or billing.
OWNER	Coach / authorised administrator
PERMITTED AUDIENCE	Administrative access only; credential verification separately authorised

COMPLETE THE DOCUMENT

- Record scheduled and actual duration separately.
- Distinguish coaching time from preparation, administration, supervision and mentoring.
- Record paid, pro bono and cancelled work accurately.
- Reconcile with CD61; check current credential rules before using hours for an application.

JUDGEMENT AND BOUNDARY

Do not multiply team session time by headcount or include no-shows as coaching hours. This log does not certify eligibility for any credential.

WORKED SITUATION / FICTIONAL

E-204 session: 60 minutes booked, 55 minutes of coaching delivered and 10 minutes of administration afterwards. Only actual coaching time enters the coaching-hours column.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R7 | Original guidance and form. Core-route option.



6A / ACTIVATE

CD35

Session attendance and coaching-hours log

Delivery log

WORKING COPY / Administrative access only; credential verification separately authorised

REFERENCE

VERSION / DATE

Date / session	Scheduled minutes	Actual coaching minutes	Attendance / format	Paid / pro bono	Other work minutes

Reconciliation and exclusions

Sources, corrections and items not counted as coaching.

Prepared by / date

Verification route / permission ref

Basis: H1, R7 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ACTIVATE

CD36

Missed-session and contact record

Handle cancellations, non-attendance and follow-up fairly and discreetly.

USE WHEN	When a planned session does not occur or contact arrangements change.
OWNER	Coach / administrator
PERMITTED AUDIENCE	Minimal logistical information to approved roles

COMPLETE THE DOCUMENT

- Record the event without guessing its cause.
- Use the agreed safe contact route and a neutral message.
- Apply the actual contract terms and record any agreed exception.
- Review fit or support if a pattern persists; use concern procedures for genuine risk, not routine absence.

JUDGEMENT AND BOUNDARY

Do not chase through colleagues, leave revealing messages or infer poor motivation. A routine no-show is not itself an emergency.

WORKED SITUATION / FICTIONAL

E-204 misses a meeting. The coach sends the agreed neutral message and offers rescheduling. The file records the outcome, not speculation about disengagement.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1, R5 | Original guidance and form. Select when relevant.



6A / ACTIVATE

CD36

Missed-session and contact record

Attendance exception

WORKING COPY / Minimal logistical information to approved roles

REFERENCE

VERSION / DATE

Scheduled session / date

Attendance event

Known facts and source

Use the reason only if provided and necessary.

Contact attempted and safe channel

Date, time, neutral wording and response.

Terms applied / exception agreed

Cancellation or refund reference; separate billing decision.

Next step

Next contact and responsible person

Avoid repeated or intrusive contact.

Record completed by / date

Agreement or log updated

Basis: H1, R1, R5 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



05

Apply

Make learning visible in real work.

Agree small workplace experiments, keep actions realistic, review observed practice and prepare sponsor updates from authorised material only.

8 DOCUMENTS / CD37-CD44

[Open the section document directory >](#)



6A / APPLY

DOCUMENT INDEX / APPLY

The document directory

Select a document. CD identifiers are new pack references; they do not replace the T and X tool identifiers.

ID	Document	Guide	Form
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CD38	Coaching action and commitment log	109	110
CD39	Between-session activity brief	111	112
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CD41	Sponsor progress update	116	117
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SELECT. COMPLETE. CHECK. FILE.

Keep the original blank master. Save an authorised working copy and share only the information agreed for that recipient.

Source architecture H1-H2 | Original CD document family / operational selection is not a mandatory checklist.

6A / APPLY

CD37

Workplace experiment agreement

Record a safe, informative test of a chosen work behaviour.

USE WHEN	When the coachee wants to try a different practice.
OWNER	Coachee; coach supports; operational owner authorises where needed
PERMITTED AUDIENCE	Coach/coachee and only agreed affected colleagues

COMPLETE THE DOCUMENT

- 01 Define one behaviour in one appropriate situation.
- 02 Write the prediction and what would count as useful evidence.
- 03 Agree permissions, support, stop conditions and workload implications.
- 04 Review action, result and explanation separately before choosing the next step.

JUDGEMENT AND BOUNDARY

No unsupervised safety-critical experiment or bypass of formal authority. Participation by colleagues must be appropriately agreed.

WORKED SITUATION / FICTIONAL

E-204 will agree a checkpoint before two routine recommendations. They predict fewer unplanned take-backs; missing information or material risk remains a valid reason to intervene.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R3 | Original guidance and form. Core-route option.



6A / APPLY

CD37

Workplace experiment agreement

Small test in real work

WORKING COPY / Coach/coachee and only agreed affected colleagues

REFERENCE

VERSION / DATE

Experiment / goal ID

Planned window / review

Behaviour and work opportunity

What will be different and where?

Prediction and evidence

Baseline, opportunities, observations and limits.

Permissions, support and boundaries

Affected people; authority; stop conditions.

Actual practice and result

Record what happened, not only whether it felt successful.

Learning and alternative explanations

What else may explain the result?

Next decision

Basis: H1, R3 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / APPLY

CD38

Coaching action and commitment log

Keep agreed actions visible while preserving the coachee's ownership and the right to revise them.

USE WHEN	After sessions; at progress reviews.
OWNER	Coachee with coach
PERMITTED AUDIENCE	Shared record; sponsor version only as agreed

COMPLETE THE DOCUMENT

- 01** Use a small number of specific actions.
- 02** Record owner, support and realistic timing.
- 03** Review evidence and changed conditions, not just completion ticks.
- 04** Mark revised or withdrawn actions openly and retain the reason.

JUDGEMENT AND BOUNDARY

An overdue action is a prompt for inquiry, not a score of commitment. Do not transfer the sponsor's decision responsibility to the coachee.

WORKED SITUATION / FICTIONAL

E-204 A1 requests authority clarification; the sponsor owns the answer. A2 rehearses a delegation opening. Their dependencies and review dates remain distinct.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R3 | Original guidance and form. Core-route option.



6A / APPLY

CD38

Coaching action and commitment log

Actions and review

WORKING COPY / Shared record; sponsor version only as agreed

REFERENCE

VERSION / DATE

ID / goal	Action / owner	Due / opportunity	Support / dependency	Status / evidence

Revised, declined or blocked actions

What changed; who decides; no retrospective deletion.

Next review focus

One useful decision, not a demand to complete every action.

Basis: H1, R3 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / APPLY

CD39

Between-session activity brief

Give an agreed activity clear instructions, limits and a route back into coaching.

USE WHEN	When assigning optional preparation or workplace practice.
OWNER	Coach and coachee agree; coachee owns participation
PERMITTED AUDIENCE	Coachee; other people only where required and agreed

COMPLETE THE DOCUMENT

- 01 Explain the purpose and estimated effort.
- 02 State concrete steps and any supporting material.
- 03 Agree permissions, boundaries and alternatives.
- 04 Specify what to bring back and how to judge usefulness.

JUDGEMENT AND BOUNDARY

Do not issue a workbook page without explaining its relevance. An activity is not an assessment unless explicitly designed and authorised as one.

WORKED SITUATION / FICTIONAL

E-204 chooses a 15-minute review of one meeting agenda and a short rehearsal. They may bring observations verbally instead of completing a written diary.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R3 | Original guidance and form. Select when relevant.



6A / APPLY

CD39

Between-session activity brief

Activity brief

WORKING COPY / Coachee; other people only where required and agreed

REFERENCE

VERSION / DATE

Activity / toolkit ID

Related goal / next session

Purpose and expected benefit

What question will this help explore?

Instructions

Clear sequence; no more detail than needed for this assignment.

Estimated effort / timing

Materials / access

Boundaries and alternatives

Permissions; stop conditions; accessible alternatives.

What to bring back

Evidence, observations, questions or a decision not to continue.

Coachee agreement / date

Review appointment

Basis: H1, R3 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / APPLY

CD40

Private coaching progress review

Review goal progress with evidence while preserving context and uncertainty.

USE WHEN	At agreed checkpoints, before deciding continuation or re-contracting.
OWNER	Coach and coachee
PERMITTED AUDIENCE	Private developmental review; use CD41 for sponsor reporting

COMPLETE THE DOCUMENT

- 01 Revisit the original goal and any documented changes.
- 02 Compare baseline with observed practice and available opportunities.
- 03 Record useful change, limited evidence and unintended effects.
- 04 Agree continue, adapt, pause or close and release only an agreed summary.

JUDGEMENT AND BOUNDARY

Do not convert unlike goals into one percentage score or assume change was caused by coaching. Keep satisfaction separate from application.

WORKED SITUATION / FICTIONAL

E-204 has explicit checkpoints in three of four later reviews, compared with two of four initially. The small samples and a simultaneous reporting-process change prevent a causal claim.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R3, R14 | Original guidance and form. Core-route option.



6A / APPLY

CD40

Private coaching progress review

Progress evidence

WORKING COPY / Private developmental review; use CD41 for sponsor reporting

REFERENCE

VERSION / DATE

Review date / period

Goal / baseline version

Original goal and changes

Keep original wording and amendment reference visible.

Evidence / opportunity	Baseline	Current observation	Limit / other explanation

Coachee learning and experienced change

In their own words; distinguish confidence from behaviour.

Support, barriers and unintended effects

What is still owned by another person?

Basis: H1, R3, R14 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / APPLY

CD40

Private coaching progress review

Next developmental decision

WORKING COPY / Private developmental review; use CD41 for sponsor reporting

REFERENCE

VERSION / DATE

Decision

Select / not yet decided

Reason and conditions

Use evidence, not a completion score alone.

Next actions, owners and work opportunities

Update CD28 / CD37 / CD38 where useful.

What can be shared with a sponsor

Prepare a separate CD41; no private note attachment.

Differences or unresolved matters

Coachee may disagree with an interpretation.

Agreed by / date

Next review / change trigger

Basis: H1, R3, R14 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / APPLY

CD41

Sponsor progress update

Provide the minimum agreed evidence of delivery, development and support needs without disclosing private session content.

USE WHEN	At agreed sponsor checkpoints.
OWNER	Coachee and coach prepare; release under CD11 / CD13
PERMITTED AUDIENCE	Named sponsor / programme owner only

COMPLETE THE DOCUMENT

- 01** Check the recipient, purpose and permitted content before drafting.
- 02** Report service delivery separately from learning and application.
- 03** Use bounded evidence and clear requests for sponsor action.
- 04** Let the coachee check the exact version; retain the release record.

JUDGEMENT AND BOUNDARY

Exclude private notes, diagnostic speculation, protected assessment detail and promotion recommendations. Legal disclosure duties use a separate route.

WORKED SITUATION / FICTIONAL

E-204 sponsor update records a trialled delegation checkpoint and a request to clarify scope authority. It does not include the director's private reflection or a judgement about personality.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1, R5, R14 | Original guidance and form. Core-route option.



6A / APPLY

CD41

Sponsor progress update

Agreed sponsor update

WORKING COPY / Named sponsor / programme owner only

REFERENCE

VERSION / DATE

Recipient / purpose

Period / approved version

Agreed goals and delivery

Only the level of detail allowed by the protocol.

Progress and workplace evidence

Label self-report, corroboration and limitations.

Support or decisions required from sponsor

Specific request, accountable owner and timing.

Next focus and review

No confidential session narrative.

Limitations and what is not being claimed

No causal attribution, psychological verdict or selection conclusion.

Coachee wording confirmed / date

Release authority / sent date

Basis: H1, R1, R5, R14 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / APPLY

CD42

Midpoint four-way review meeting record

Check whether the purpose, service and organisational support still fit.

USE WHEN	At the agreed midpoint or after a material change.
OWNER	All four roles; programme owner records shared decisions
PERMITTED AUDIENCE	Named participants; no private session record attached

COMPLETE THE DOCUMENT

- 01 Agree the agenda and disclosure boundaries with the coachee first.
- 02 Review agreed goals, delivery and work opportunity.
- 03 Hear differences without requiring private disclosure.
- 04 Record decisions, sponsor actions and whether re-contracting is needed.

JUDGEMENT AND BOUNDARY

Do not use the meeting to spring a performance judgement or demand access to private coaching notes.

WORKED SITUATION / FICTIONAL

E-204 reports the chosen meeting practice. The sponsor confirms a revised approval boundary and the programme owner records a scheduling adjustment. The remaining sessions retain the original privacy limits.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1, R14 | Original guidance and form. Select when relevant.



6A / APPLY

CD42

Midpoint four-way review meeting record

Midpoint review

WORKING COPY / Named participants; no private session record attached

REFERENCE

VERSION / DATE

Meeting date / engagement

Participants / four roles

Purpose and information limits confirmed

Use approved summary rather than private notes.

Shared progress and differing perspectives

Evidence and limits; record material differences fairly.

Decision / action	Owner	Due date	Review evidence

Changes to agreement or support

Use CD20 for formal amendments.

Record agreed by / date

Next review / distribution

Basis: H1, R1, R14 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / APPLY

CD43

Targeted behavioural feedback return

Gather brief feedback on a specific agreed practice, not a general judgement of the person.

USE WHEN	After an authorised experiment or observation window.
OWNER	Willing observer; coach/coachee receive under agreed protocol
PERMITTED AUDIENCE	As stated before participation; not anonymous by default

COMPLETE THE DOCUMENT

- 01 Specify one observable practice and time window.
- 02 Record opportunity to observe before asking about quality.
- 03 Invite an example, effect and useful suggestion.
- 04 Keep not observed and nonresponse separate from negative feedback.

JUDGEMENT AND BOUNDARY

Original developmental record; no norm, cut-off or total psychological score. Do not pressure direct reports to provide favourable comments.

WORKED SITUATION / FICTIONAL

Observer R2 saw two E-204 review meetings. In one, concerns were invited before a recommendation; in the other they were not. The response reports both, without assigning a permanent style.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R13, R14 | Original guidance and form. Select when relevant.



6A / APPLY

CD43

Targeted behavioural feedback return

Feedback on one work practice

WORKING COPY / As stated before participation; not anonymous by default

REFERENCE

VERSION / DATE

Practice / goal ID

Observation window / respondent code

Participation and privacy

Use only after purpose, audience and retention have been explained. Participation is optional. This form is identifiable unless a separate credible aggregation process has been agreed.

Opportunity to observe

What I observed

Specific behaviour and situation; avoid motives or personality labels.

What difference it appeared to make

Distinguish your experience from a verified operational result.

What might help next time

A constructive suggestion; the coachee retains choice.

Context or limitations

What you cannot comment on; any correction request.

Basis: H1, R13, R14 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / APPLY

CD44

Manager and workplace-support agreement

Secure the conditions for practice without expanding the manager's access to coaching content.

USE WHEN	Before workplace experiments or where support is missing.
OWNER	Coachee and manager / operational owner
PERMITTED AUDIENCE	Agreed support commitments only

COMPLETE THE DOCUMENT

- 01 Describe the practice at the level needed for operational support.
- 02 Agree authority, time, resources and permissible feedback.
- 03 Identify legitimate intervention and escalation conditions.
- 04 Review whether support happened without requiring private disclosure.

JUDGEMENT AND BOUNDARY

Manager support is not permission for covert monitoring. A coach cannot authorise operational or technical work beyond their role.

WORKED SITUATION / FICTIONAL

E-204 and the manager agree one checkpoint, decision limits and protected preparation time. The manager receives the practice plan but not the coaching file.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R3 | Original guidance and form. Select when relevant.



6A / APPLY

CD44

Manager and workplace-support agreement

Conditions for application

WORKING COPY / Agreed support commitments only

REFERENCE

VERSION / DATE

Practice / goal reference

Supporting manager / owner

Work opportunity and authority

Task, decisions and limits.

Time, resources and practical support

What will actually be available and when?

Feedback and review arrangements

Who observes what; permission; no covert performance collection.

Intervention and escalation conditions

What requires immediate operational action rather than coaching.

Commitment	Owner	Due / frequency	Review

Agreement / date

Next review

Basis: H1, R3 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



06

Assure

Review honestly. Close responsibly.

Bring together evidence, experience and remaining conditions. Handle concerns through the right route and conclude the engagement without implying indefinite dependence.

8 DOCUMENTS / CD45-CD52

[Open the section document directory >](#)



6A / ASSURE

DOCUMENT INDEX / ASSURE

The document directory

Select a document. CD identifiers are new pack references; they do not replace the T and X tool identifiers.

ID	Document	Guide	Form
CD45	Final coaching review and contribution record	126	127-128
CD46	Coaching completion and closure letter	129	130
CD47	Maintenance and follow-up plan	131	132
CD48	Pause, early ending and rematch record	133	134
CD49	Concern, safety escalation and referral record	135	136-137
CD50	Feedback, complaint and resolution record	138	139-140
CD51	Ethical decision and professional consultation record	141	142
CD52	Agreed final sponsor summary	143	144

SELECT. COMPLETE. CHECK. FILE.

Keep the original blank master. Save an authorised working copy and share only the information agreed for that recipient.

Source architecture H1-H2 | Original CD document family / operational selection is not a mandatory checklist.

6A / ASSURE

CD45

Final coaching review and contribution record

Review what changed, what remains uncertain and what the engagement plausibly contributed.

USE WHEN	At planned closure or early ending.
OWNER	Coachee and coach
PERMITTED AUDIENCE	Private final review; share CD52 separately

COMPLETE THE DOCUMENT

- 01 Revisit original goals and documented changes.
- 02 Review learning, application, work outcomes and conditions separately.
- 03 Include limited evidence, unsuccessful attempts and other influences.
- 04 Decide what to retain, what needs another owner and whether any new engagement is justified.

JUDGEMENT AND BOUNDARY

Do not retrospectively redefine goals, turn capacity released into cash savings without evidence, or claim that coaching alone caused a work result.

WORKED SITUATION / FICTIONAL

E-204 retains two practical routines but cannot attribute an improved decision cycle solely to coaching because information flow also changed. The sponsor owns the remaining approval issue.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R14 | Original guidance and form. Core-route option.



6A / ASSURE

CD45

Final coaching review and contribution record

Evidence at closure

WORKING COPY / Private final review; share CD52 separately

REFERENCE

VERSION / DATE

Engagement / closure date

Goals / latest plan reference

Goal / intended practice	What changed	Evidence / limits	Other influences

Coachee view of learning and value

What helped; what did not; what remains unfinished.

Unintended effects and remaining risks

Include dependence, burden or unresolved boundaries.



6A / ASSURE

CD45

Final coaching review and contribution record

Contribution and continuation

WORKING COPY / Private final review; share CD52 separately

REFERENCE

VERSION / DATE

Reasoned contribution account

What coaching plausibly helped; evidence for and against; do not overclaim.

Practices to retain and support needed

Link to CD47; keep ownership explicit.

Outstanding issues and receiving owner

Seek acknowledgement where work is handed over.

Engagement decision

Select / not yet decided

Permitted final summary

Use CD52; do not release this private review automatically.

Coachee review / date

Coach completion / record action

Basis: H1, R14 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ASSURE

CD46

Coaching completion and closure letter

Confirm what ends, what remains and how information will be handled.

USE WHEN	After the closing conversation.
OWNER	Coach / provider
PERMITTED AUDIENCE	Coachee; limited administrative confirmation to purchaser where agreed

COMPLETE THE DOCUMENT

- 01** Confirm the engagement reference and effective end date.
- 02** State the agreed next steps and any outstanding obligations.
- 03** Explain contact limits and the record lifecycle.
- 04** Keep the letter factual; completion is not a competence certificate.

JUDGEMENT AND BOUNDARY

Do not imply permanent improvement, unrestricted confidentiality or continuing support that has not been contracted.

WORKED SITUATION / FICTIONAL

E-204 receives a closure letter confirming the end of six sessions, the agreed self-review plan and the privacy contact. It makes no claim of qualification or guaranteed future performance.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1 | Original guidance and form. Select when relevant.



6A / ASSURE

CD46

Coaching completion and closure letter

Closure confirmation

WORKING COPY / Coachee; limited administrative confirmation to purchaser where agreed

REFERENCE

VERSION / DATE

To / date

Engagement reference / effective end

Opening wording

This letter confirms that the coaching engagement identified above has ended under the arrangements agreed with you. It records the practical next steps below; it is not a qualification or an assessment of your suitability for a role.

Agreed conclusion and continuing actions

Use the coachee-agreed wording; keep detail proportionate.

Outstanding administrative matters

Final invoice, return of material, referrals or unresolved complaint route.

Records and future contact

Approved retention / disposal; contact limits; privacy and concerns contacts.

Closing wording

Thank you for the work you brought to the relationship. Any future coaching would begin with a new purpose and agreement. The applicable information protections and obligations continue after closure.

Coach / provider sign-off

Recipient / distribution check

Basis: H1, R1 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ASSURE

CD47

Maintenance and follow-up plan

Leave the coachee with a practical way to sustain learning independently.

USE WHEN	At closure and at any separately agreed follow-up.
OWNER	Coachee
PERMITTED AUDIENCE	Coachee; agreed support requests to named people

COMPLETE THE DOCUMENT

- 01 Choose only practices that are worth retaining.
- 02 Specify cues, support and signs that the context has changed.
- 03 Plan proportionate self-review and a restart after setbacks.
- 04 Identify when different support is needed and keep any paid follow-up explicit.

JUDGEMENT AND BOUNDARY

Independence is not abandonment. Do not use normal uncertainty as a reason to create an indefinite engagement.

WORKED SITUATION / FICTIONAL

E-204 chooses a monthly review of two decision episodes and a peer check-in by mutual agreement. A new role mandate would trigger a new support decision rather than automatic coaching renewal.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R3 | Original guidance and form. Select when relevant.



6A / ASSURE

CD47

Maintenance and follow-up plan

Continue without the coach

WORKING COPY / Coachee; agreed support requests to named people

REFERENCE

VERSION / DATE

Practice to retain	Cue / opportunity	Support / owner	Review evidence

Drift or changed-context signals

What would mean the practice needs adaptation or another response?

Restart and alternative support

Manager, peer, specialist, supervisor or a new coaching question.

Self-review date / rhythm

Any agreed follow-up service

My continuing commitment

In the coachee's words; no guarantee is requested.

Basis: H1, R3 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ASSURE

CD48

Pause, early ending and rematch record

End or pause an unsuitable arrangement with dignity and practical continuity.

USE WHEN	At either party's request or when continuing is inappropriate.
OWNER	Coach / programme owner with coachee
PERMITTED AUDIENCE	Only necessary information to the receiving support roles

COMPLETE THE DOCUMENT

- 01 Listen to the request without demanding unnecessary justification.
- 02 Separate a no-fault rematch from a formal complaint or safety issue.
- 03 Agree immediate contact, financial and continuity arrangements.
- 04 Document only the information needed for the next step and retain relevant records.

JUDGEMENT AND BOUNDARY

No punitive coachability label. Do not force a complainant to negotiate privately with the person whose conduct concerns them.

WORKED SITUATION / FICTIONAL

E-204 requests a different coach after a change of role. The programme owner records a rematch need and availability, not a negative judgement about either party.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1, R2 | Original guidance and form. Select when relevant.



6A / ASSURE

CD48

Pause, early ending and rematch record

Pause or end responsibly

WORKING COPY / Only necessary information to the receiving support roles

REFERENCE

VERSION / DATE

Request date / initiated by

Engagement reference

Requested route

Select / not yet decided

Necessary reason / context

No detailed personal account required for a no-fault request.

Immediate support and communication

Who contacts the coachee; safe method; no gap where support is needed.

Contract, fees and record implications

Current terms; final reconciliation; retention / hold.

Information to transfer and authority

Only agreed essentials; use CD13 / CD58 if required.

Agreed action / owner

Effective date / review

Basis: H1, R1, R2 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ASSURE

CD49

Concern, safety escalation and referral record

Document a proportionate response when a need or concern exceeds the coaching remit.

USE WHEN	When competence limits or a material safety concern arise.
OWNER	Coach with the appropriate qualified contact
PERMITTED AUDIENCE	Strictly restricted; minimum necessary disclosure to appropriate recipient

COMPLETE THE DOCUMENT

- 01 Address any immediate danger through verified local emergency or safeguarding arrangements; do not delay to complete this form.
- 02 Record direct observations and attributed statements without diagnosis.
- 03 Seek appropriate qualified advice; agree a non-urgent referral with the person where appropriate.
- 04 Record the basis, minimum disclosure, receiving route and follow-up within the coach's remit.

JUDGEMENT AND BOUNDARY

Not a clinical assessment, risk-prediction scale or emergency service. Urgent duties may require action without consent; verify the applicable route and document why. Do not investigate abuse or provide treatment.

WORKED SITUATION / FICTIONAL

Fictional boundary example: a coachee asks for help with an issue outside the coach's competence. The coach explains the limit, discusses qualified support and agrees a follow-up on access, not on treatment details.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R1, R5, R12 | Original guidance and form. Select when relevant.



6A / ASSURE

CD49

Concern, safety escalation and referral record

Immediate action and facts

WORKING COPY / Strictly restricted; minimum necessary disclosure to appropriate recipient

REFERENCE

VERSION / DATE

Act before paperwork

Where there is immediate danger, contact the appropriate verified local emergency or safeguarding service promptly. Use this record after immediate steps are under way; do not wait for a supervision appointment.

Date / time / location context

Person / case reference

Observed facts and attributed statements

Use necessary accurate words; no clinical labels or speculation.

Immediate action and relevant contact

Who was contacted, when and by what verified route.

Qualified advice and decision basis

Name role, advice and applicable duty or agreement; preserve uncertainty.

Information disclosed and recipient

Minimum content; timing; whether informing the person was safe / permitted.

Basis: H1, R1, R5, R12 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / ASSURE

CD49

Concern, safety escalation and referral record

Referral and follow-through

WORKING COPY / Strictly restricted; minimum necessary disclosure to appropriate recipient

REFERENCE

VERSION / DATE

Coaching status

Select / not yet decided

Referral discussed / offered

Provider or service; choice; practical access; no guarantee of availability.

Consent or other justified disclosure basis

Record the basis separately from the existence of concern.

Receiving route and follow-up

Confirmation where possible; owner; time; limits of the coach's role.

Person informed and response

Do not delay urgent required action while seeking permission.

Professional support and record protection

Supervision / advice reference; restricted location; retention or hold.

Completed by / date

Review owner / date

Basis: H1, R1, R5, R12 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ASSURE

CD50

Feedback, complaint and resolution record

Provide a fair route to raise concerns and keep the response accountable.

USE WHEN	On receipt of a concern; distinguish routine feedback from a formal complaint.
OWNER	Independent or appropriately separated complaint owner
PERMITTED AUDIENCE	Restricted complaint process; not routine coaching or sponsor file

COMPLETE THE DOCUMENT

- 01 Acknowledge the concern and explain the process and support route.
- 02 Check independence, scope and any urgent protection need.
- 03 Preserve relevant evidence and invite a fair response through the approved procedure.
- 04 Record decision, reasons, remedies, communication and review or appeal route.

JUDGEMENT AND BOUNDARY

No promise of secrecy, a predetermined outcome or a universal response deadline. Use applicable legal, organisational and professional-body procedures; avoid retaliation.

WORKED SITUATION / FICTIONAL

Fictional example: a coachee questions a progress disclosure. The complaint owner preserves the approved summary and release record, checks recipients and keeps case administration separate from the investigation.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R1, R2, R5 | Original guidance and form. Select when relevant.



6A / ASSURE

CD50

Feedback, complaint and resolution record

Receipt and plan

WORKING COPY / Restricted complaint process; not routine coaching or sponsor file

REFERENCE

VERSION / DATE

Complaint ID / received date

Owner / independence check

Concern in the person's words

Necessary facts, requested outcome and safe contact.

Urgent safeguards and support

Any immediate restriction or alternative coach; no admission presumed.

Applicable process and timetable

Verified deadlines, acknowledgement and next update.

Evidence to preserve / lawful hold

Relevant versions, recipients and access controls.

Scope and fair response plan

Who will be heard; conflicts; specialist route if required.

Basis: H1, R1, R2, R5 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



6A / ASSURE

CD50

Feedback, complaint and resolution record

Outcome and follow-up

WORKING COPY / Restricted complaint process; not routine coaching or sponsor file

REFERENCE

VERSION / DATE

Findings and reasons

Distinguish established facts, unresolved matters and judgement.

Decision, remedy and responsible owner

Actions and realistic dates; reference policy / authority.

Communication to relevant parties

Minimum appropriate information; acknowledgement of receipt.

Review / appeal or professional-body route

Verified contact and time limit; do not obstruct other rights.

Learning, closure and records

System improvement; retention or continuing hold.

Decision-maker / date

Next check / closure date

Basis: H1, R1, R2, R5 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ASSURE

CD51

Ethical decision and professional consultation record

Make a difficult professional judgement traceable without reducing it to a tick-box verdict.

USE WHEN	When duties, interests or information boundaries conflict.
OWNER	Coach; supervisor or qualified adviser where needed
PERMITTED AUDIENCE	Restricted professional record; de-identified consultation where feasible

COMPLETE THE DOCUMENT

- 01 State the dilemma, facts and unknowns.
- 02 Identify affected people, obligations, options and possible harms.
- 03 Seek relevant ethical, legal or specialist advice without unnecessary disclosure.
- 04 Record the decision, rationale, communication and review trigger.

JUDGEMENT AND BOUNDARY

A supervisor does not replace legal advice or operational authority. Record advice as advice, not permission to ignore duties.

WORKED SITUATION / FICTIONAL

E-204's sponsor requests raw notes. The coach checks the agreement, explains the approved progress route and seeks advice on any asserted legal entitlement rather than disclose automatically.

WORKING FORM

1 page

[Open the form >](#)

Basis: H1, R1, R2 | Original guidance and form. Select when relevant.



6A / ASSURE

CD51

Ethical decision and professional consultation record

Reasoned ethical judgement

WORKING COPY / Restricted professional record; de-identified consultation where feasible

REFERENCE

VERSION / DATE

Dilemma and material facts

What is known; what is assumed; who may be affected.

Relevant obligations and competing interests

Agreement, professional code, verified law and role boundaries.

Option	Likely benefits / risks	Authority / advice needed

Consultation and decision

Who advised; what was decided; reasons and limits.

Communication and review

Minimum disclosure; owner; trigger to revisit.

Basis: H1, R1, R2 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

6A / ASSURE

CD52

Agreed final sponsor summary

Close the sponsor's information loop without releasing the private final review.

USE WHEN	After coachee review and before administrative closure.
OWNER	Coachee and coach; programme owner as agreed
PERMITTED AUDIENCE	Named sponsor / purchaser at the approved level

COMPLETE THE DOCUMENT

- 01 Confirm the agreed audience and final-summary scope.
- 02 Describe delivery, selected application evidence and limitations.
- 03 State continuing support actions and where responsibility now sits.
- 04 Approve the exact version and record its release.

JUDGEMENT AND BOUNDARY

Not a fitness-for-role opinion or a personality report. Do not substitute a favourable satisfaction comment for evidence of changed work.

WORKED SITUATION / FICTIONAL

E-204's final summary names the practices trialled, the limited evidence available and the outstanding authority action. The private closure conversation remains separate.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R1, R14 | Original guidance and form. Select when relevant.



6A / ASSURE

CD52

Agreed final sponsor summary

Final sponsor communication

WORKING COPY / Named sponsor / purchaser at the approved level

REFERENCE

VERSION / DATE

Recipient / approved purpose

Engagement / closure date

Service delivered and agreed objectives

Administrative facts and only agreed goal wording.

Application and contribution supported by evidence

Keep source, context and limits explicit.

What remains unresolved or owned elsewhere

No implication that every work outcome belongs to coaching.

Continuing support and responsible owner

Actions accepted by the relevant operational role.

Limits and next organisational decision

No causal or employment conclusion beyond evidence and authority.

Coachee version approval / date

Released by / date / method

Basis: H1, R1, R14 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



07

Professional practice

Keep the practice trustworthy and sustainable.

These records support supervision, development, verification, data handling, continuity and commercial administration. This is a cross-cutting record family, not a seventh A.

12 DOCUMENTS / CD53-CD64

[Open the section document directory >](#)



ACROSS THE 6A SYSTEM

DOCUMENT INDEX / PROFESSIONAL PRACTICE

The document directory

Select a document. CD identifiers are new pack references; they do not replace the T and X tool identifiers.

ID	Document	Guide	Form
CD53	Coaching supervision agreement	147	148
CD54	Supervision case submission and learning record	149	150-151
CD55	CPD and observed-practice development record	152	153
CD56	Coaching-hours verification and permission	154	155
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CD63	Testimonial and case-publication permission	172	173
CD64	Practice quality and case-file review	174	175

SELECT. COMPLETE. CHECK. FILE.

Keep the original blank master. Save an authorised working copy and share only the information agreed for that recipient.

Source architecture H1-H2 | Original CD document family / operational selection is not a mandatory checklist.

ACROSS THE 6A SYSTEM

CD53

Coaching supervision agreement

Contract for reflective professional support with clear purpose, competence and confidentiality.

USE WHEN	Before individual or group supervision begins; review periodically.
OWNER	Coach and supervisor
PERMITTED AUDIENCE	Supervision parties; attendance evidence only to others where agreed

COMPLETE THE DOCUMENT

- 01 Agree supervision purpose, roles, competence and format.
- 02 Distinguish supervision from line management, therapy and mentor coaching.
- 03 Set boundaries for case information, recording and escalation.
- 04 Agree frequency, fees, review, concerns and ending arrangements.

JUDGEMENT AND BOUNDARY

Do not assert a universal required ratio or guarantee absolute confidentiality. Check the actual professional-body and organisational requirements.

WORKED SITUATION / FICTIONAL

The fictional coach contracts for reflective supervision using de-identified episodes and an agreed route for urgent professional concerns. Credential-related mentoring is recorded separately.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R2, R15 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD53

Coaching supervision agreement

Supervision relationship

WORKING COPY / Supervision parties; attendance evidence only to others where agreed

REFERENCE

VERSION / DATE

Supervisor / competence evidence

Supervisee / professional scope

Purpose, format and responsibilities

Reflective inquiry, ethical practice and learning; clarify any evaluative role.

Cadence / duration / fees

Review and cancellation terms

Confidentiality and case material

Minimise identification; group obligations; recording and technology decisions.

Limits, referral and immediate concern route

What cannot wait; qualified legal or clinical routes remain separate.

Records, reporting and ending

Attendance versus case content; retention; review; safe exit.

Supervisor confirmation / date

Coach confirmation / date

Basis: H1, R2, R15 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

ACROSS THE 6A SYSTEM

CD54

Supervision case submission and learning record

Prepare a focused professional question and record the coach's learning and follow-through.

USE WHEN	Before and after supervision.
OWNER	Coach; supervisor records only their agreed part
PERMITTED AUDIENCE	Restricted supervision file; minimise identifiers

COMPLETE THE DOCUMENT

- 01 Select a question about your own practice and remove unnecessary identifying details.
- 02 Summarise relevant facts, context and what you have tried.
- 03 Explore alternatives and responsibilities during supervision.
- 04 Record learning and the action you own, not an unnecessary transcript of the client's life.

JUDGEMENT AND BOUNDARY

Keep any safeguarding, complaint or legal evidence in its appropriate controlled record. Supervision is not permission to disclose unrestricted case details.

WORKED SITUATION / FICTIONAL

The fictional coach asks how to respond to a sponsor's request without narrowing E-204's agency. The learning record identifies a clearer opening explanation and a check of the information protocol.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R2, R15 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD54

Supervision case submission and learning record

Prepare the supervision question

WORKING COPY / Restricted supervision file; minimise identifiers

REFERENCE

VERSION / DATE

Date / supervision reference

Case code / identifying detail check

My professional question

What judgement or intervention needs examination?

Relevant facts and context

Minimum information needed; distinguish account and observation.

What I did and what I am unsure about

My assumptions, reactions, choices and boundaries.

Options or advice already considered

Include unresolved duties and sources.

Desired supervision output

Better judgement, an action, a learning need or a referral.

Basis: H1, R2, R15 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



ACROSS THE 6A SYSTEM

CD54

Supervision case submission and learning record

Learning and follow-through

WORKING COPY / Restricted supervision file; minimise identifiers

REFERENCE

VERSION / DATE

What became clearer

Record learning, not a transcript.

Alternative approaches and ethical implications

What will I do differently; what remains uncertain?

Action I own

Person responsible, timing, permission and any qualified consultation.

Practice evidence to review

How I will check whether the adjustment helped.

What may be reported elsewhere

Normally attendance or de-identified learning only, as agreed.

Completed by / date

Next review

Basis: H1, R2, R15 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

ACROSS THE 6A SYSTEM

CD55

CPD and observed-practice development record

Connect professional learning to evidence of improved practice.

USE WHEN	After learning, feedback or observed practice; review periodically.
OWNER	Coach
PERMITTED AUDIENCE	Professional development record; client information excluded

COMPLETE THE DOCUMENT

- 01 Identify the capability or ethical issue being developed.
- 02 Record the learning activity and evidence of attendance or completion.
- 03 Use observed practice and feedback where appropriate and authorised.
- 04 State how the learning will change practice and how it will be reviewed.

JUDGEMENT AND BOUNDARY

Attendance alone is not evidence of competence. Do not claim credential credit without checking the relevant body's rules.

WORKED SITUATION / FICTIONAL

The fictional coach practises separating observation from interpretation, receives feedback on one recorded role-play and checks the change in later supervised practice.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R3, R15 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD55

CPD and observed-practice development record

Professional learning

WORKING COPY / Professional development record; client information excluded

REFERENCE

VERSION / DATE

Date / activity	Capability / purpose	Time / evidence	Application / review

Observed practice and feedback

Authority to observe; setting; specific evidence; no unnecessary client data.

Development decision

Next learning, supervision or scope restriction.

Coach review / date

Next review point

Basis: H1, R3, R15 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

ACROSS THE 6A SYSTEM

CD56

Coaching-hours verification and permission

Support an accurate experience record and a lawful, consent-aware verification route.

USE WHEN	When maintaining or submitting a credential-related experience claim.
OWNER	Coach; authorised verifier where applicable
PERMITTED AUDIENCE	Named credential body / verifier only under the stated route

COMPLETE THE DOCUMENT

- 01 Check the current rules for the credential and type of coaching.
- 02 Reconcile actual hours with CD35, keeping non-coaching work separate.
- 03 Obtain and record the relevant client permission or organisational verification route.
- 04 Provide only the requested minimum verification information through the approved process.

JUDGEMENT AND BOUNDARY

This is not an official credential-body form and does not certify eligibility. Do not attach private session notes to an experience claim.

WORKED SITUATION / FICTIONAL

E-204's employer confirms the period and actual coaching hours through an authorised contact where appropriate. Client identity information is not circulated merely to make the log look complete.

WORKING FORM
1 page
[Open the form >](#)

Basis: R7 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD56

Coaching-hours verification and permission

Verification request

WORKING COPY / Named credential body / verifier only under the stated route

REFERENCE

VERSION / DATE

Credential / body / rule checked

Date / source reference

Coach / engagement type

Period / actual coaching hours

Reconciliation and exclusions

Paid / pro bono; individual / group / team; source records.

Verification route and contact

Client permission or authorised organisational confirmation as applicable.

Client information decision

Select / not yet decided

Exact information authorised

Recipient, purpose, timing and retention; no session content.

Confirmation / date

Submission / verification record

Basis: R7 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

ACROSS THE 6A SYSTEM

CD57

Record retention, return and disposal schedule

Give every record class a justified lifecycle and accountable custodian.

USE WHEN	Before collection; at closure; on scheduled review or hold.
OWNER	Accountable data owner with coach / privacy adviser
PERMITTED AUDIENCE	Restricted administrative control; notice to affected people as appropriate

COMPLETE THE DOCUMENT

- 01 Inventory each record category and purpose.
- 02 Confirm actual legal, contractual and professional requirements before selecting a period.
- 03 Define trigger, access, storage, return or destruction and hold arrangements.
- 04 Verify disposal across copies, platforms and backups; record limits rather than claim deletion you cannot confirm.

JUDGEMENT AND BOUNDARY

No universal coaching retention period is prescribed. A legal hold or active concern may affect disposal; do not delete to avoid scrutiny.

WORKED SITUATION / FICTIONAL

E-204 contracts, private notes, assessment reports and invoices have different approved lifecycles. The closure review checks downloads and shared access as well as the principal folder.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R1, R9, R10 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD57

Record retention, return and disposal schedule

Approved lifecycle schedule

WORKING COPY / Restricted administrative control; notice to affected people as appropriate

REFERENCE

VERSION / DATE

Service / accountable data owner

Privacy review / version

Record class / purpose	Custodian / access	Trigger / period and basis	Return / disposal route
Enquiry and intake			
Contracts and permissions			
Private session notes			
Shared progress records			
Assessment reports			
Finance / experience logs			
Digital copies / recordings			

Hold and review procedure

Who can pause deletion; authority; periodic review.

Approved by / date

Next review

Basis: H1, R1, R9, R10 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



ACROSS THE 6A SYSTEM

CD57

Record retention, return and disposal schedule

Return or disposal certificate

WORKING COPY / Restricted administrative control; notice to affected people as appropriate

REFERENCE

VERSION / DATE

Engagement / record batch

Action date / responsible person

Records and copies covered

Reference the inventory; include authorised exports and device copies.

Action

Select / not yet decided

Method and verification

System confirmations, third-party confirmation and residual backups.

Exceptions, holds or unverified copies

State limitations and next review; do not claim full deletion without evidence.

Access removed / recipient informed

Who, when and what was confirmed.

Actioned by / date

Independent check where applicable

Basis: H1, R1, R9, R10 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

ACROSS THE 6A SYSTEM

CD58

Information-rights and disclosure request log

Route access, correction, deletion or compulsory disclosure requests without improper release or destruction.

USE WHEN	On any information-rights request or external demand.
OWNER	Accountable privacy / legal owner with coach
PERMITTED AUDIENCE	Restricted request-handling team

COMPLETE THE DOCUMENT

- Record the request, receipt date and secure contact route.
- Verify identity, authority, scope and applicable deadline proportionately.
- Preserve relevant records and obtain qualified advice on disclosure, exemptions and third-party rights.
- Record searches, decisions, response and secure transmission; maintain an audit trail.

JUDGEMENT AND BOUNDARY

A label such as private coach notes does not decide legal access. Do not refuse automatically, delete on demand without checking duties, or release to a lawyer merely because asked.

WORKED SITUATION / FICTIONAL

Fictional example: a coachee asks for their records. The coach refers it promptly to the accountable privacy owner, confirms scope and searches relevant locations while protecting other people's information.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R5, R9, R10, R11, R16 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD58

Information-rights and disclosure request log

Request and handling plan

WORKING COPY / Restricted request-handling team

REFERENCE

VERSION / DATE

Request ID / received date

Requester / safe contact

Request type

Select / not yet decided

Scope, identity and authority checked

Proportionate verification; evidence reference.

Applicable process and response deadline

Jurisdiction / legal source checked; responsible adviser.

Locations searched and preservation

Contract, notes, emails, platform copies; third-party records.

Assessment and advice

Rights, duties, exemptions, third-party interests and proposed response.

Basis: H1, R5, R9, R10, R11, R16 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



ACROSS THE 6A SYSTEM

CD58

Information-rights and disclosure request log

Decision and response

WORKING COPY / Restricted request-handling team

REFERENCE

VERSION / DATE

Decision and reasons

What will be provided, amended, retained or withheld and why.

Response package and quality check

Versions, redactions, metadata, hidden content and authorisation.

Response sent / method

Identity / destination rechecked

Follow-up, challenge and remedy route

Explain the actual route and relevant time limits.

Audit trail and retention

Record changes and any hold; preserve original where required.

Approved by / date

Closed / next review

Basis: H1, R5, R9, R10, R11, R16 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

ACROSS THE 6A SYSTEM

CD59

Personal-data incident record

Record and escalate a suspected information incident promptly with a clear decision trail.

USE WHEN	Immediately on discovery; update as facts develop.
OWNER	Coach reports; accountable incident lead manages response
PERMITTED AUDIENCE	Restricted incident team and required recipients only

COMPLETE THE DOCUMENT

- 01 Contain the exposure without destroying evidence; use the approved incident route.
- 02 Record what is known, when it became known and who may be affected.
- 03 Let the responsible privacy / security lead assess reporting duties and deadlines.
- 04 Record notifications, remediation, recovery and lessons; preserve the decision not to notify where justified.

JUDGEMENT AND BOUNDARY

Notification thresholds and deadlines vary by jurisdiction. Do not apply a UK deadline as a global rule or treat a checkbox as an assessment of harm.

WORKED SITUATION / FICTIONAL

Fictional example: a progress file is misaddressed. The coach reports immediately, requests containment through the approved route and records the exact file version rather than assume no harm occurred.

WORKING FORM

2 pages

[Open the form >](#)

Basis: R1, R17 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD59

Personal-data incident record

Incident and containment

WORKING COPY / Restricted incident team and required recipients only

REFERENCE

VERSION / DATE

Incident ID / discovery date-time

Reporter / incident lead

Known facts and current uncertainty

What happened; detection; systems and versions.

Data and people potentially affected

Sensitivity, volume, exposure duration and third parties.

Immediate containment and evidence

Actions, times, owners and preserved logs.

Escalation and applicable duties

Privacy / security / legal contacts; deadlines verified.

Initial risk assessment reference

Responsible specialist; likely impacts; facts still required.

Basis: R1, R17 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



ACROSS THE 6A SYSTEM

CD59

Personal-data incident record

Notifications, recovery and learning

WORKING COPY / Restricted incident team and required recipients only

REFERENCE

VERSION / DATE

Recipient / authority	Notify decision / basis	Deadline / sent time	Owner / evidence

Remediation and recovery

Access restrictions, corrected records and affected-person support.

Lessons and control changes

Owner, due date and effectiveness check.

Closure and remaining uncertainty

Do not certify containment beyond verified facts.

Incident lead sign-off

Next review / retention action

Basis: R1, R17 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

ACROSS THE 6A SYSTEM

CD60

Practice continuity and records-custodian plan

Protect clients and records if a coach becomes unavailable, incapacitated or unable to continue.

USE WHEN	Before taking cases; test and review periodically.
OWNER	Coach / provider with authorised custodian
PERMITTED AUDIENCE	Restricted plan; clients receive an appropriate explanation

COMPLETE THE DOCUMENT

- 01 Name a willing, competent custodian and a backup.
- 02 Define activation triggers and who verifies authority.
- 03 Separate access to a contact index from access to private notes.
- 04 Plan client contact, safe transfer or closure, records and financial reconciliation; test without exposing live data.

JUDGEMENT AND BOUNDARY

Do not give a colleague unrestricted credentials or assume death or incapacity releases confidentiality. Confirm legal authority and privacy safeguards.

WORKED SITUATION / FICTIONAL

The fictional coach appoints a custodian who can access a limited client-contact register on verified activation. Private notes transfer only under an appropriate basis and minimum necessary scope.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R1, R2, R10 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD60

Practice continuity and records-custodian plan

Continuity arrangements

WORKING COPY / Restricted plan; clients receive an appropriate explanation

REFERENCE

VERSION / DATE

Plan owner / version

Custodian / backup contact

Activation triggers and verification

Absence, incapacity, death, service closure; who verifies authority.

Access method and information limits

Secure contact index, approval process and prohibited access.

Client contact and service continuity

Neutral wording; rematch / refund / closure options; urgent support routes.

Records and obligations

Preservation, transfer, retention, disposal and insurer / legal contact.

Test and review

Date, test evidence, changes and next review.

Custodian acceptance / date

Owner approval / date

Basis: H1, R1, R2, R10 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

ACROSS THE 6A SYSTEM

CD61

Service, invoice and expense reconciliation

Bill accurately without exposing coaching content or counting non-delivery as coaching hours.

USE WHEN	At the agreed billing point and closure.
OWNER	Coach / provider finance
PERMITTED AUDIENCE	Purchaser and authorised finance roles; no private case notes

COMPLETE THE DOCUMENT

- 01 Reconcile delivered services with the approved agreement and actual session log.
- 02 Separate coaching, preparation, assessment, expenses and cancellation charges.
- 03 Verify currency, tax treatment and required invoice particulars locally.
- 04 Send a discreet invoice through the approved route and track settlement.

JUDGEMENT AND BOUNDARY

Not a jurisdiction-specific tax invoice. Verify local requirements, registration, tax and expense evidence; do not include a developmental issue in the line description.

WORKED SITUATION / FICTIONAL

E-204 invoice describes coaching sessions by service reference and date. No private goal, assessment result or reason for cancellation appears in the finance record.

WORKING FORM

2 pages

[Open the form >](#)

Basis: H1, R4, R7 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD61

Service, invoice and expense reconciliation

Invoice / service statement

WORKING COPY / Purchaser and authorised finance roles; no private case notes

REFERENCE

VERSION / DATE

Provider legal details / invoice ref

Purchaser details / issue date

Agreement / purchase order

Currency / payment due date

Date / service description	Quantity	Unit rate	Amount

Subtotal / approved expenses

Tax basis / tax amount

Total payable

Payment method / verified details

Required local particulars and notes

Registration, credit/refund reference and applicable tax wording.

Basis: H1, R4, R7 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.



ACROSS THE 6A SYSTEM

CD61

Service, invoice and expense reconciliation

Reconciliation and settlement

WORKING COPY / Purchaser and authorised finance roles; no private case notes

REFERENCE

VERSION / DATE

Source record / service	Delivered / billed units	Variance / reason	Approval

Expense evidence / approvals

Receipts and policy reference; no unnecessary client detail.

Cancellation or refund treatment

Contract clause; agreed exception; credit note where required.

Paid amount / date / reference

Outstanding amount / action

Prepared by / date

Reviewed by / date

Basis: H1, R4, R7 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

ACROSS THE 6A SYSTEM

CD62

Team or group coaching supplementary agreement

Add the specific information and participation arrangements needed when more than one coachee is involved.

USE WHEN	Before a team or group engagement; alongside CD09-CD12.
OWNER	Coach, group / team members and sponsor / programme roles
PERMITTED AUDIENCE	Named parties; separate individual information remains restricted

COMPLETE THE DOCUMENT

- 01 Clarify whether the client is a team or a group of individuals and the coach's competence.
- 02 Agree member responsibilities, shared records and handling of individual contact.
- 03 Explain the limits of confidentiality between participants and the handling of membership changes.
- 04 Set conflict, concern, recording and reporting arrangements before work begins.

JUDGEMENT AND BOUNDARY

An addendum does not establish team-coaching competence. The coach cannot guarantee how other members behave or promise group anonymity.

WORKED SITUATION / FICTIONAL

Fictional team example: members agree not to attribute colleagues' comments outside sessions. They also understand this is a behavioural agreement, not a technical guarantee; sponsor reporting covers agreed team actions.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R1, R2, R3 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD62

Team or group coaching supplementary agreement

Multiple-participant agreement

WORKING COPY / Named parties; separate individual information remains restricted

REFERENCE

VERSION / DATE

Team / group and purpose

Coach / sponsor / programme owner

Client definition, scope and competence

Distinguish team coaching from facilitation, training or therapy.

Participation and member commitments

Choice, attendance, respect, information and new / departing members.

Confidentiality and individual contact

Limits between members; how one-to-one disclosures are handled.

Shared outputs and sponsor reporting

What is recorded; approval method; individual assessment boundaries.

Concern, conflict and technology arrangements

Independent route; recording / transcription decisions.

Member agreement and annex reference

Signatures or approved confirmation register; do not prefill.

Basis: H1, R1, R2, R3 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

ACROSS THE 6A SYSTEM

CD63

Testimonial and case-publication permission

Keep optional publicity separate from the delivery of coaching.

USE WHEN	Only for a defined proposed quotation, case or image use.
OWNER	Identifiable person(s) and authorised organisational rights holder
PERMITTED AUDIENCE	Named publisher / channels for approved content only

COMPLETE THE DOCUMENT

- 01 Show the exact text, image or case version.
- 02 Explain audience, channels, identification, duration and withdrawal limits.
- 03 Check rights of other people and the organisation.
- 04 Record the freely made decision and final publication check.

JUDGEMENT AND BOUNDARY

No service disadvantage for refusal. Removing a name does not guarantee anonymity, and coachee permission does not grant rights over employer information or other people's data.

WORKED SITUATION / FICTIONAL

E-204 declines a public testimonial but permits no change in service as a result. A future anonymised case would still need an identifiability and rights review.

WORKING FORM
1 page
[Open the form >](#)

Basis: R1, R9, R11 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD63

Testimonial and case-publication permission

One optional publication

WORKING COPY / Named publisher / channels for approved content only

REFERENCE

VERSION / DATE

Content / version reference

Publisher / purpose

Exact approved content

Attach the version; do not substitute a later edited quotation.

Identity, channels and duration

Name, role, employer, image; intended audience; access period.

Other rights and identifiability checks

Third parties, organisational information and combinations of detail.

Decision

Select / not yet decided

Withdrawal and practical limits

How to stop future use; what cannot be recalled once published.

Person's confirmation / date

Final release check / publication record

Basis: R1, R9, R11 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

ACROSS THE 6A SYSTEM

CD64

Practice quality and case-file review

Check whether the documentation supports good practice rather than simply demonstrating that forms exist.

USE WHEN	Periodically; after an incident or before scaling provision.
OWNER	Coach / authorised quality reviewer
PERMITTED AUDIENCE	Restricted quality record; programme themes only when appropriately aggregated

COMPLETE THE DOCUMENT

- 01 Select an authorised sample and explain the review purpose.
- 02 Check substance, current agreements, evidence, consent and record handling.
- 03 Distinguish absent evidence from non-compliance and investigate fairly.
- 04 Assign improvement actions and check completion; do not claim professional certification from the checklist.

JUDGEMENT AND BOUNDARY

Reviewers need authority and minimum necessary access. A high completion percentage cannot override a serious safety, privacy or competence concern.

WORKED SITUATION / FICTIONAL

A fictional review finds that E-204's sponsor summary was approved but the case index still lists the old sponsor. The action is to correct access and confirm removal, not simply increase a compliance score.

WORKING FORM
1 page
[Open the form >](#)

Basis: H1, R1, R2, R3 | Original guidance and form. Select when relevant.



ACROSS THE 6A SYSTEM

CD64

Practice quality and case-file review

Quality review and improvement

WORKING COPY / Restricted quality record; programme themes only when appropriately aggregated

REFERENCE

VERSION / DATE

Reviewer / authority / date

Scope / sample and limitations

Review area	Evidence / finding	Action / owner	Due / verified
Purpose and fit			
Current agreement			
Information and permissions			
Goals / review evidence			
Session / hour accuracy			
Supervision / competence			
Records / access / retention			
Closure / concerns / continuity			

Critical unresolved matters

Immediate action and accountable escalation; do not average away.

Review conclusion and next check

Improvement decision, not a certificate of compliance.

Basis: H1, R1, R2, R3 | Original HR Delivery record. v1.0 / Complete only the fields needed; use a continuation record when necessary.

Follow one fictional engagement.

E-204 connects the agreement, session, workplace experiment, progress review and ending. It is not a real client record.

Case and boundaries

The coachee is a newly appointed director in a fictional infrastructure business. Their work involves cross-functional recommendations and gate reviews. They want to delegate more clearly without losing appropriate visibility of risk. The sponsor still needs to clarify scope approval authority.

Purpose of the worked documents

Twelve completed document examples show how information changes with audience and purpose. CD31 is detailed enough for professional continuity; CD32 is the short shared version; CD41 and CD52 contain only the separately agreed sponsor content.

A limited evidence story

Two of four initial selected records contain explicit checkpoints. Three of four later examples do. The denominator, small sample and concurrent reporting change are retained. The illustration does not prove coaching caused a general improvement.

No fictional approval is a real approval

Names, signatures and legal defaults are not fabricated. Text such as "confirmed for this fictional example" demonstrates the field's purpose, not an executed agreement. Actual participants, terms, permissions and dates must be established for live work.

Read across the records

Start with CD10-CD11, then compare CD21, CD31-CD32 and CD37-CD38. Read CD40 before CD41 to see what is left out of the sponsor update. Finish with CD45-CD46 and CD52.

Apply the discipline, not the facts

Use the forms to document actual work. A sparse or uncertain record can be honest. Do not copy a numerical result, a consent decision, a concern conclusion or a legal statement from the example into a live file.

6A / AGREE

CD10

Four-way coaching relationship agreement

1 / Shared purpose and four roles

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE

E-204 / fictional

VERSION / DATE

Example only

Engagement / version / date

Planned period / review dates

E-204 / v1.0 / 13 October 2026

Six sessions; review after sessions 3 and 6

Shared developmental purpose

Improve the way the director delegates recommendations and closes decisions in cross-functional reviews.

Coachee responsibilities and choices

Bring relevant work episodes; choose practices to test; decide what reflection to retain privately; raise concerns about fit or boundaries.

Coach responsibilities and scope

Provide work-focused coaching, check interpretations, use appropriate supervision and stay within agreed professional competence.

Sponsor commitments

Confirm approval authority, provide a weekly preparation window and support proportionate checkpoints rather than surprise intervention.

Programme-owner responsibilities

Arrange access and scheduling, offer an independent concern route, support practitioner quality and manage agreed service evaluation.

Overlapping or additional roles

The programme owner is the learning lead. The line manager is also the sponsor; these responsibilities are named separately.

Basis: H1, R1, R2 | Original HR Delivery record. Do not copy fictional decisions into live work.

6A / AGREE

CD10

Four-way coaching relationship agreement

2 / Boundaries and informed agreement

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE

E-204 / fictional

VERSION / DATE

Example only

Information protocol

CD11 v1.0. Programme owner receives attendance only. Sponsor receives agreed goals, evidence of application and support requests; private notes and assessment detail excluded.

Practical arrangements

Six 60-minute sessions over four months; midpoint and closing reviews. Approved private meeting room or agreed online platform.

Working style, assessment and digital choices

Invite challenge without insisting on personal disclosure. No recording, observers, automated transcription or AI processing of session content.

Concern, pause, rematch and ending route

Concerns may be raised with the programme owner through the private route supplied to the coachee. Review the match or pause the work without requiring a personality explanation.

Understanding checked / unresolved differences

All four roles can explain the information boundary. Clarification of material scope authority remains a sponsor action, not a coaching outcome.

Coachee confirmation / date

Coachee role: confirmed for this fictional example

Coach confirmation / date

Coach role: confirmed for this fictional example

Sponsor confirmation / date

Sponsor role: confirmed for this fictional example

Programme owner confirmation / date

Programme-owner role: confirmed for this fictional example

Basis: H1, R1, R2 | Original HR Delivery record. Do not copy fictional decisions into live work.

6A / AGREE

CD11

Information-sharing and access protocol

Information flows

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE	E-204 / fictional	VERSION / DATE	Example only
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Operating rule

No routine disclosure outside this protocol. Assess legal or urgent safety obligations through the approved route; record only the minimum disclosure needed.

Record / information	Recipient and purpose	Allowed content / exclusions	Timing / secure route
Attendance	Programme owner: scheduling	Date and actual minutes only	After sessions; restricted register
Goals and actions	Coachee and coach: learning	Agreed work goal and chosen action	Approved shared record
Progress summary	Sponsor: provide support	Agreed evidence and support needs	Midpoint and close; secure route
Private session notes	Coach: continuity of practice	No routine sponsor disclosure	Restricted coaching file
Assessment reports	Authorised recipient only	No instrument selected at this point	Separate permission if later used
Supervision material	Supervisor: coach reflection	De-identified minimum case detail	Agreed supervision arrangement
Other authorised flow	None currently agreed	A new purpose needs a new decision	Do not infer blanket permission

Authority and approvals

Four roles agree this protocol; specific additional disclosure uses CD13. A required disclosure follows the verified applicable duty and qualified route.

Queries, exceptions and review

Owner: coach and programme lead. Review after a change of sponsor, purpose, tool or concern. Template example is not a jurisdiction-specific legal conclusion.

Basis: H1, R1, R2, R5 | Original HR Delivery record. Do not copy fictional decisions into live work.

CD21

Coaching goals and baseline record

One goal and its evidence

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE	E-204 / fictional	VERSION / DATE	Example only
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Goal ID / version

Defined on / review date

G1 / v1.0

13 October 2026 / midpoint

Coachee-owned goal and work situation

Before a recommendation is delegated, make the decision boundary, evidence requirement and checkpoint explicit with the task owner.

Baseline evidence

Of four recent review records selected for discussion, two contain explicit checkpoints. Selection is small and not a representative performance sample.

Expected change / behavioural anchor

In the next four appropriate opportunities, agree and record the checkpoint before the work starts. An exception is explained rather than silently treated as failure.

Review method and permissions

Review the agreed delegation record and brief task-owner feedback, with permission. Keep missing observations and differences visible.

Context, support and alternative explanations

The sponsor must clarify material scope approval. A new reporting routine is starting at the same time and may also affect results.

Coachee agreement / date

Coach check / next step

Coachee agrees the focus in this fictional case

Coach will review practice and context, not score potential

Basis: H1, R3, R14 | Original HR Delivery record. Do not copy fictional decisions into live work.



6A / ACTIVATE

CD31

Confidential coach session file note

Session evidence and learning

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE	E-204 / fictional	VERSION / DATE	Example only
Session date / number	Coach / mode / actual minutes		
27 October 2026 / session 2	Coach role / online / 60 minutes		

Agreed focus and context change

Explore a recent take-back of a draft recommendation. No change to the coaching agreement; scope authority remains unresolved.

Coachee's account of the work episode

The coachee said a missing risk update prompted them to rewrite the recommendation before asking the specialist what was needed.

Direct observations and checked meaning

The coachee distinguished the missing information from the approval decision when asked to reconstruct the sequence. No inference about the specialist's motives was made.

Coaching intervention and response

The coach asked what had been delegated, checked the stated boundary and invited rehearsal of one clarification question. The coachee revised their proposed opening.

Learning or decision in the coachee's words

"I can ask what decision is missing before I take back the whole piece of work."

Provisional hypothesis / alternative (only if useful)

Provisional account: deadline pressure and incomplete delegation may interact. Alternative: the task genuinely exceeded the available authority; check with sponsor.

Basis: H1, R1, R5, R9 | Original HR Delivery record. Do not copy fictional decisions into live work.



6A / ACTIVATE

CD31

Confidential coach session file note

Actions, boundaries and audit trail

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE

E-204 / fictional

VERSION / DATE

Example only

Chosen next step or deliberate reflection

Ask the task owner what decision or evidence is missing; agree one checkpoint for the next suitable recommendation.

Support / authority needed outside coaching

The sponsor owns clarification of material scope approval. The specialist retains technical sign-off.

Boundary, concern or referral follow-up

No new safety or referral concern was raised in this fictional session. Revisit the agreement if the work moves into formal assessment.

What may be included in the shared summary

Share the agreed question, checkpoint experiment and sponsor support request only. Do not share this private account or provisional hypothesis.

Next meeting / preparation

Session 3 / bring one delegation record

Note completed by / date

Coach role / completed after the session

Amendment record

Original note retained. Any later correction will be dated and attributed; no retrospective replacement of the account.

File handling

Store in the approved restricted location under CD08 / CD57. Keep administration and sponsor reporting separate. Use the editable Word version or an approved continuation record if this space is insufficient.

Basis: H1, R1, R5, R9 | Original HR Delivery record. Do not copy fictional decisions into live work.



6A / ACTIVATE

CD32

Shared session summary

What to carry forward

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE E-204 / fictional VERSION / DATE Example only

Session date / number

27 October 2026 / session 2

Prepared with / version

Coach and coachee / v1.0

Focus we worked on

How to clarify the decision needed without automatically taking back a recommendation.

Learning the coachee wishes to retain

A missing update is not always a reason to take over the whole task. Ask about evidence, authority and support separately.

Chosen action or reflection

Agree one checkpoint with the task owner before the next suitable recommendation; use the clarification question rehearsed today.

Support, limits and review evidence

Specialist sign-off remains unchanged. Sponsor to clarify scope approval. Review the record and agreed feedback after the trial.

Next session / preparation

Bring one actual example and one question to session 3. No additional assessment has been agreed.

Coachee wording checked / date

Wording checked by coachee in fictional case

Permitted recipient(s) / release reference

Coach/coachee; sponsor summary separate

Basis: H1, R5, R6 | Original HR Delivery record. Do not copy fictional decisions into live work.

6A / APPLY

CD37

Workplace experiment agreement

Small test in real work

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE	E-204 / fictional	VERSION / DATE	Example only
Experiment / goal ID	Planned window / review		
EXP1 / G1	Two work opportunities before session 3		

Behaviour and work opportunity

Before delegating a routine recommendation, agree the outcome, authority, information and one checkpoint with the task owner.

Prediction and evidence

Prediction: clearer boundaries will reduce avoidable take-back. Evidence: agreement, actual intervention and task-owner feedback; not just a favourable result.

Permissions, support and boundaries

Task owner agrees. Technical approvals remain unchanged. Stop the trial if it would bypass a safety, legal or formal authority requirement.

Actual practice and result

Two opportunities: one ran with the agreed checkpoint; one required an earlier intervention because necessary information had not arrived.

Learning and alternative explanations

The checkpoint was useful but information availability remained a constraint. The record does not establish a general habit or coaching causation.

Next decision

Adapt

Basis: H1, R3 | Original HR Delivery record. Do not copy fictional decisions into live work.

6A / APPLY

CD38

Coaching action and commitment log

Actions and review

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE E-204 / fictional VERSION / DATE Example only

ID / goal	Action / owner	Due / opportunity	Support / dependency	Status / evidence
A1 / G1	Director: ask sponsor to clarify scope authority	Before next gate review	Sponsor decision	Open: clarification requested
A2 / G1	Director and task owner: agree one checkpoint	Next suitable recommendation	Task-owner agreement	Completed once; second trial adapted
A3 / G1	Coach/coachee: review two work episodes	Session 3	Permission for feedback	Planned; evidence not yet complete
Unused	-	-	-	-
Unused	-	-	-	-
Unused	-	-	-	-
Unused	-	-	-	-
Unused	-	-	-	-

Revised, declined or blocked actions

The authority action remains with the sponsor. No criticism of commitment is inferred from the information delay.

Next review focus

Check whether the checkpoint was used and what prompted intervention; do not count every completed task as successful transfer.

Basis: H1, R3 | Original HR Delivery record. Do not copy fictional decisions into live work.



6A / APPLY

CD40

Private coaching progress review

Progress evidence

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE E-204 / fictional VERSION / DATE Example only

Review date / period Goal / baseline version

Midpoint / after session 3 G1 v1.0 / CD21

Original goal and changes

G1 remains relevant. The focus is the explicit delegation checkpoint, not the broader promise of eliminating all escalation.

Evidence / opportunity	Baseline	Current observation	Limit / other explanation
Written checkpoint	2 of 4 initial records	3 of 4 later records	Small selected samples
Task-owner experience	Not recorded consistently	Two brief agreed accounts	Different work opportunities
Work outcome	Mixed; no common measure	One avoidable take-back discussed	New reporting routine also began
Authority condition	Scope approval unclear	Clarification still incomplete	Owned by sponsor

Coachee learning and experienced change

The director reports being more deliberate about asking for the missing decision before intervening. The record includes an unsuccessful attempt.

Support, barriers and unintended effects

Protected preparation time helped. Information arrived late in one trial. No claim of a stable habit or total business impact is made.

Basis: H1, R3, R14 | Original HR Delivery record. Do not copy fictional decisions into live work.



6A / APPLY

CD40

Private coaching progress review

Next developmental decision

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE	E-204 / fictional	VERSION / DATE	Example only
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Decision

Adapt

Reason and conditions

Continue the relevant practice while resolving the information and authority conditions. The observed change is encouraging but not sufficient for a causal claim.

Next actions, owners and work opportunities

Director: repeat the checkpoint in two suitable situations. Sponsor: confirm the scope boundary. Coach: review the evidence and the coachee's experience.

What can be shared with a sponsor

Only the agreed practice, limited evidence and support request. Prepare CD41 separately; do not send this whole review.

Differences or unresolved matters

Coachee and sponsor may describe progress differently. Their perspectives will be discussed rather than averaged into a single score.

Agreed by / date

Coach and coachee / midpoint review

Next review / change trigger

After two further opportunities or material context change

Basis: H1, R3, R14 | Original HR Delivery record. Do not copy fictional decisions into live work.



6A / APPLY

CD41

Sponsor progress update

Agreed sponsor update

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE E-204 / fictional VERSION / DATE Example only

Recipient / purpose

Period / approved version

Sponsor / enable workplace application

Midpoint / v1.0

Agreed goals and delivery

Three planned coaching sessions delivered. Agreed focus: explicit delegation boundaries and checkpoints for recommendations.

Progress and workplace evidence

A checkpoint is recorded in three of four later examples, compared with two of four initially. This is limited, selected evidence, not a general rating.

Support or decisions required from sponsor

Clarify who approves material scope changes and protect the agreed preparation window.

Next focus and review

Trial the revised routine in two further situations and review at the next agreed point.

Limitations and what is not being claimed

Other reporting changes occurred during the same period. No personality conclusion, promotion recommendation or causal business claim is made.

Coachee wording confirmed / date

Release authority / sent date

Coachee approved this wording for the fictional example

CD11 protocol; send only this approved update

Basis: H1, R1, R5, R14 | Original HR Delivery record. Do not copy fictional decisions into live work.



6A / ASSURE

CD45

Final coaching review and contribution record

Evidence at closure

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE E-204 / fictional VERSION / DATE Example only

Engagement / closure date

Goals / latest plan reference

E-204 / end of six sessions

G1 v1.0; agreed final review

Goal / intended practice	What changed	Evidence / limits	Other influences
Delegation checkpoint	More explicit preparation in selected examples	Written record and limited agreed feedback	Reporting routine also changed
Decision clarification	Asks for the missing decision before takeover	Coachee account plus two reviewed episodes	Task complexity varied
Scope authority	Not fully resolved	Sponsor action still open	Governance decision outside coaching
Unused	-	-	-

Coachee view of learning and value

The director values a clearer distinction between supporting the task and taking it back. Two routines are worth retaining.

Unintended effects and remaining risks

The evidence remains small and context-dependent. Avoid treating this ending as proof of universal readiness or permanent behavioural change.

Basis: H1, R14 | Original HR Delivery record. Do not copy fictional decisions into live work.



6A / ASSURE

CD45

Final coaching review and contribution record

Contribution and continuation

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE

E-204 / fictional

VERSION / DATE

Example only

Reasoned contribution account

Coaching plausibly supported reflection and rehearsal of useful routines. The observations cannot isolate its effect from the new reporting process or the sponsor's actions.

Practices to retain and support needed

Retain the checkpoint agreement and clarification question. Use monthly self-review of two work episodes; seek feedback when appropriate.

Outstanding issues and receiving owner

Scope-approval clarification remains with the sponsor. Information dependencies remain with the operating process owner.

Engagement decision

Close as planned

Permitted final summary

Approved final summary contains service delivered, bounded application evidence, remaining organisational actions and limitations only.

Coachee review / date

Coachee reviewed the account in the fictional case

Coach completion / record action

Coach: apply approved record schedule

Basis: H1, R14 | Original HR Delivery record. Do not copy fictional decisions into live work.



6A / ASSURE

CD46

Coaching completion and closure letter

Closure confirmation

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE	E-204 / fictional	VERSION / DATE	Example only
To / date	Engagement reference / effective end		
Coachee / closing review date	E-204 / after session 6		

Opening wording

This letter confirms that the coaching engagement identified above has ended under the arrangements agreed with you. It records the practical next steps below; it is not a qualification or an assessment of your suitability for a role.

Agreed conclusion and continuing actions

The planned engagement concludes. Retain the two chosen routines and the self-review plan. The unresolved scope question stays with the sponsor.

Outstanding administrative matters

Reconcile the delivered service against the agreement. Any fee or refund is determined by the actual approved terms; no new charge is assumed here.

Records and future contact

Records follow the verified schedule, not an example retention period. No ongoing availability is implied. Further coaching requires a new purpose and agreement.

Closing wording

Thank you for the work you brought to the relationship. Any future coaching would begin with a new purpose and agreement. The applicable information protections and obligations continue after closure.

Coach / provider sign-off

Coach role / fictional example, not a signature

Recipient / distribution check

Coachee only; sponsor receives CD52 separately

Basis: H1, R1 | Original HR Delivery record. Do not copy fictional decisions into live work.

6A / ASSURE

CD52

Agreed final sponsor summary

Final sponsor communication

FICTIONAL E-204 / ILLUSTRATIVE ENTRIES - NOT A SIGNED OR APPROVED LIVE RECORD

REFERENCE	E-204 / fictional	VERSION / DATE	Example only
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Recipient / approved purpose

Engagement / closure date

Sponsor / final service review

E-204 / after session 6

Service delivered and agreed objectives

Six sessions delivered. Objectives concerned delegation checkpoints and clearer decision conversations.

Application and contribution supported by evidence

Selected records and agreed feedback support useful practice changes. Coaching may have contributed alongside a new reporting routine; no isolated effect is claimed.

What remains unresolved or owned elsewhere

Scope approval is still an organisational decision. Information dependencies remain with operating owners.

Continuing support and responsible owner

Sponsor to confirm scope authority. Director to use monthly self-review and proportionate colleague feedback.

Limits and next organisational decision

Close this engagement as planned. Do not infer promotion readiness, a psychological verdict or a need for an automatic extension.

Coachee version approval / date

Released by / date / method

Coachee confirmed final example version

Coach / approved secure route / closing review

Basis: H1, R1, R14 | Original HR Delivery record. Do not copy fictional decisions into live work.

Source register / 1 of 4

Targeted desk research checked on 13 October 2026. Links open the primary source. Recheck current requirements before live use.

H1**HR Delivery. Coaching and Mentoring at Work. D6, Editorial Edition, October 2026.**

Supplied 131-page ebook. Framework: pp.4-7; agreements: pp.19-23; ethics: pp.46-50; practice development: pp.58-62; evaluation and closure: pp.63-71. Source terminology is preserved; CD templates are new operational applications.

H2**HR Delivery Coaching Framework. October 2026.**

Supplied 20-page introduction and companion coaching toolkit. 6A names, four-party responsibilities and the Ethical / Useful / Applied / Evidenced lens are retained. Original logo, portrait and framework artwork reused.

R1**International Coaching Federation. ICF Code of Ethics. Effective 1 April 2025.**

Professional duties concerning agreements, confidentiality, records, technology, conflicts, scope and value. The pack supplies original implementation records; it neither reproduces nor modifies the code.

[Open primary source >](#)

R2**International Coaching Federation. Insights and Considerations for Ethics.**

Ethical reflection and application of the code. Used to consider exceptions, consultation and the reasoning behind a decision, rather than to create a pass/fail ethics score.

[Open primary source >](#)

R3**International Coaching Federation. 2025 ICF Core Competencies.**

Public competency overview consulted for agreements, trust, awareness and learning. The forms are not a credential assessment or an official competency-rating instrument.

[Open primary source >](#)

Source register / 2 of 4

Targeted desk research checked on 13 October 2026. Links open the primary source. Recheck current requirements before live use.

R4

International Coaching Federation. Sample Coaching Agreement. Historical sample hosted by ICF Luxembourg.

Reviewed for coverage of service terms only. Historical clauses are not copied. CD09 omits universal liability exclusions, fixed retention periods and unreviewed financial or legal defaults.

[Open primary source >](#)

R5

International Coaching Federation. Can a Coach Break Confidentiality?

Practice discussion of confidentiality, concise records and possible legal disclosure. Local law and qualified advice determine actual obligations; a private-note label is not a claim of legal privilege.

[Open primary source >](#)

R6

NHS South West Leadership Academy. Resources & Tools; coach preparation and reflection resource.

The public operational-resource index and available preparation/reflection material informed document categories. The full linked template collection was not retrieved or reproduced. CD records are original.

[Open primary source >](#)

R7

International Coaching Federation. Experience requirements for credential applications.

Used for accurate delivery records and permission before sharing verification details. Current scheme rules must be checked at submission; the pack does not certify eligible hours.

[Open primary source >](#)

R8

International Coaching Federation. Artificial Intelligence Coaching Framework and Standards: public overview.

Overview informs a separate purpose, permission and human-responsibility decision. CD16 is a local decision record, not an AI certification, security audit or complete vendor assessment.

[Open primary source >](#)

Source register / 3 of 4

Targeted desk research checked on 13 October 2026. Links open the primary source. Recheck current requirements before live use.

R9

UK Information Commissioner's Office. Data minimisation.

UK regulatory guidance consulted for proportionate collection. Used as a design reference, not a statement that UK GDPR applies to every coach or every location.

[Open primary source >](#)

R10

UK Information Commissioner's Office. Storage limitation.

Supports a purpose-based lifecycle and documented decisions. No universal period is inserted. Verify applicable law, contractual duties and holds, including copies and platform records.

[Open primary source >](#)

R11

UK Information Commissioner's Office. The right to be informed.

Reference for explaining processing purposes, recipients, rights and lifecycle. CD12 requires local completion and approval; acknowledgement of a notice is not blanket consent.

[Open primary source >](#)

R12

International Coaching Federation. Referring a Client to Therapy.

Professional-scope and referral resource. It does not qualify a coach to diagnose or manage a clinical emergency. CD49 requires verified local emergency and specialist routes.

[Open primary source >](#)

R13

International Test Commission. International Guidelines on Test Use, version 1.2.

Test-user competence, intended use, information, security and interpretation. Assessment records reference authorised instruments; protected items, norms and scoring keys are not reproduced.

[Open primary source >](#)

Source register / 4 of 4

Targeted desk research checked on 13 October 2026. Links open the primary source. Recheck current requirements before live use.

R14**Network of NHS Leadership Academies. The Leadership Development Evaluation Framework, version 1.1, 2017.**

General leadership-development evaluation reference: plan, gather evidence, reflect/report and learn. No source templates or diagrams are reproduced; its historical legal statements and numerical learning claims are not adopted.

[Open primary source >](#)**R15****International Coaching Federation. Coaching Supervision.**

Reflective dialogue and professional support; supervision is distinct from mentor coaching. CD53-CD55 are not a supervision qualification or universal attendance requirement.

[Open primary source >](#)**R16****UK Information Commissioner's Office. A guide to subject access.**

Reference for identifying, searching, reviewing and responding to requests. CD58 leaves actual rights, deadlines, exemptions and third-party decisions to the responsible qualified function.

[Open primary source >](#)**R17****UK Information Commissioner's Office. Personal data breaches: a guide.**

Reference for facts, awareness time, containment, reporting decisions and learning. UK-specific thresholds and deadlines are not presented as universal rules. Local incident procedures take precedence.

[Open primary source >](#)

Keep the paperwork useful. Keep the relationship human.

Use the record to enable judgement

A professional file should make the important decisions visible: purpose, boundaries, evidence, action, support and review. It should not imply that every uncertainty has been resolved just because the boxes are complete.

Reduce duplication

Choose one home for each record. Prepare a separate authorised summary when another audience needs information. Duplicating private content across systems makes a file harder to govern and a relationship harder to explain.

End with clear ownership

At closure, confirm what the coachee will retain, who owns remaining organisational actions and what happens to access and records. Continued support should serve a defined need rather than the absence of a proper ending.

Keep improving the forms

Review which fields add value and which create unnecessary burden. Local adaptation is expected. Keep document identifiers, version history, audience and purpose visible so that a simpler form remains a dependable one.

THE PRACTICAL STANDARD

**A clear agreement. A careful note.
An honest review. A responsible ending.**



About this documentation pack.

Scope

Original operational support for adult workplace and executive coaching. It is not a clinical record system, a child-coaching protocol, a credential qualification, a legal service or a replacement for an organisation's approved procedures.

Source continuity

The 6A framework, role architecture and quality lens follow the HR Delivery source publications. CD01-CD64 are new pack identifiers. They do not renumber the earlier T and X libraries. Third-party standards retain their own terminology, ownership and scope.

Professional and legal review

The agreement, privacy notice, consent, referral, complaints, data and commercial documents require local review before deployment. UK regulatory sources are labelled as UK references. No universal retention period, deadline, liability limit or tax rate is supplied.

Formats

The complete manual contains guide pages and fillable forms. The blank form collection and individual document PDFs support working use. The Word versions are editable templates, not automated case management. PDF reader support varies; test the saved and printed output.

Permissions and privacy

The pack contains no real client records and no reproduced protected assessment items. Examples are fictional. A completed pack may contain sensitive information: separate records and recipients in actual use. Do not send the whole working library to a sponsor.

Editorial status

Prepared for HR Delivery, October 2026, with AI-assisted research and production. The foreword is a draft for Dr Phillip Welsh's approval. Professional, legal, accessibility or PDF/UA certification is not implied by the presentation.