

Agreeing programme scope

A sponsor is considering continued access after a study. One team plans for existing participants; another expects new requests to be included. A provider has estimated work for the first group. The teams have not agreed one scope.

Illustrative industry scenario. Fictional example created to explain a decision; not a client case study.

The decision

The sponsor programme owner is asked to coordinate a documented scope decision with the responsible functions before commissioning the detailed assessments. This example records a proposed next step, not an approved programme.

A practical next step

If scope is open, compare two options: continuity for existing participants, and a broader proposal including new requests. For each, identify the population, activities, assumptions and questions needing specialist assessment. If scope is agreed, assess that specific proposal and reconcile the provider estimate against it.

Illustrative scope brief

The working option is to assess continuity for existing participants. Treat new requests as a separate scope decision. The proposed output is one agreed assessment brief listing the intended population, activities, exclusions, responsible functions and information still needed. A wider scope must not silently inherit the narrower estimate.

Limits and review

The current estimate covers only one proposed population. Neither option has been assessed here for regulatory feasibility, clinical eligibility, safety arrangements, supply or operational readiness. Scope agreement tells the teams what to assess; it does not answer those assessments.

Responsibility and review

The proposed owner is the sponsor programme owner, with the relevant decision-makers. First, circulate both scope options and reconcile the assumptions. Review before detailed assessments and external commitments; reopen the brief if the intended population or activities change.

Use this brief to agree the next decision with the responsible team.

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Defining the evidence purpose

A funder is considering collecting information across several services. One proposed use is to describe participants' experience; another is to compare outcomes between approaches. The collection plan has not separated those questions.

Illustrative industry scenario. Fictional example created to explain a decision; not a client case study.

The decision

The commissioning lead is asked to agree the intended use before committing to the collection plan. This example develops a descriptive brief. Choosing a comparative purpose would reopen the design and expertise required.

A practical next step

For a descriptive purpose, define whose experience matters, what the account should explain and how it will be used. For a comparative purpose, commission a methods review of the question, design and feasibility before assuming that the same collection is sufficient.

Illustrative commissioning brief

The question is how participants describe the information and support they receive at key service transitions. The intended use is to identify questions for service improvement. The proposed output is a descriptive account, showing who contributed, how information was collected and the limits on interpretation. No data have been collected or analysed for this example.

Limits and review

Participation may favour people with particular experiences; timing and collection methods may affect what is reported. The design review should address recruitment, burden, governance and interpretation. This account would not, by itself, establish that one service caused a better outcome.

Responsibility and review

The proposed owner is the commissioning lead. First, agree the question and intended use with relevant service and participant perspectives, then obtain the appropriate methods and governance input. Review before collection begins; reopen the brief if the intended inference, population or use changes.

Use this brief to agree the next decision with the responsible team.

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Accepting a provider transition

A provider has prepared a transition pack and proposed a handover date. The receiving organisation has staff available. Open queries and continuing responsibilities still need owners, and the basis for acceptance needs agreement.

Illustrative industry scenario. Fictional example created to explain a decision; not a client case study.

The decision

The authorised receiving decision-maker is asked to agree the acceptance basis and then assess the evidence. The illustrative record below remains proposed. It does not record an accepted transfer or authorise an activity.

A practical next step

If criteria or authority are unclear, agree what is transferring, who can accept it and what evidence they need. If both are agreed, review the pack against them and record the acceptance decision, its scope and any agreed conditions. Allocate interim ownership of unresolved items in either case.

Illustrative acceptance record

Status: acceptance not yet recorded. Scope: responsibilities in the agreed transfer list. Evidence to review: the transfer list, relevant working instructions, readiness evidence and reconciled open queries. Record the receiving decision-maker, the decision and its date. For each open item, record an owner, interim arrangement and review point.

Limits and review

A complete folder and available staff are inputs to the assessment. They do not establish that the receiving organisation has accepted the responsibilities. If a material criterion remains unmet, record the gap and escalate the decision within the agreed authority.

Responsibility and review

The proposed owner is the authorised receiving decision-maker, supported by both teams. First, agree criteria and reconcile the evidence against them. Review before the planned transfer; revisit the date or scope if an unresolved item prevents acceptance. No continuity or readiness outcome is claimed.

Use this brief to agree the next decision with the responsible team.

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