



F05 CONFIGURED SUPPORTING DOCUMENT

Visitor Sign-Up Sheet

A controlled, editable working derivative for M-T1-CP-02-SD-03.
Complete local facts, approvals and operational evidence before
use.

Release truth. This file is configured for substantive review. It is not approved for public distribution or operational use. Local law, insurance, safeguarding, accessibility, privacy, brand, rights and accountable-owner checks remain mandatory.

Release control

Field	Controlled value
Status	REVIEW — configured derivative; privacy and system approval required before collection
Supporting-document code	M-T1-CP-02-SD-03
Exact derivative title	Visitor Sign-Up Sheet
Source initiative	M-T1-CP-02 - Local Markets Engagement
Source initiative code	M-T1-CP-02
Source initiative title	Local Markets Engagement
Initiative disposition	Absorbed as overlay
Canonical parent	M-T1-CP-14 - Pop-Up Rotary Activation System
Canonical parent code and title	M-T1-CP-14 - Pop-Up Rotary Activation System
Named overlay or migration label	Local Market Activation
Redirect or tombstone route	Permanent overlay alias from M-T1-CP-02 to M-T1-CP-14; retain M-T1-CP-02-SD-03 as the stable asset code
Family master	Playbook_F05_Registration_Contact_Tracking_Master.md
Family / master version	F05 / 1.0
Recorded master SHA-256	1d4fc47ca320db79141cefabddea504db96e871c731ad7e210086b0e0680a5cd
Authoritative index	Playbook_Supporting_Documents_Master_Index.md v1.1
Configured master variant	Section 18 — M-T1-CP-02-SD-03 Visitor Sign-Up Sheet overlay
Derivative version	v0.1

Adaptation note

Use as the Local Market Activation contact card or private one-person form under the Pop-Up Rotary Activation System. Pre-code every paper card or QR destination with market, date, location and shift. Collect a preferred name, one chosen contact route, one current interest and permission for that specific follow-up. Never use a public list that lets a visitor read earlier entries. Provide a secure paper card and assisted route when the QR form is inaccessible or connectivity fails.

Instructions

1. Keep the CP-02 code and Local Market Activation identity while applying CP-14 operational controls.
2. Complete privacy review and source-code configuration before the market shift begins.
3. Present one form or card per person. A clipboard sheet containing multiple visitors' details is prohibited.
4. Collect contact details only when the person requests a defined response; do not record passers-by or casual conversations without their choice.
5. Read back contact details during assisted or paper capture and let the person confirm each optional contact choice.
6. Transfer paper cards to the approved system after every shift, reconcile the custody count and dispose of authorised working copies securely.
7. Measure meaningful conversations, valid records and completed next steps separately; foot traffic is not a sign-up count.

Controlled configuration fields

Field	Completion instruction	Evidence
{{ACCOUNTABLE_ENTITY}}	Enter the club or District unit responsible for the activation.	Initiative approval
{{MARKET_NAME}} / {{MARKET_DATE}} / {{MARKET_LOCATION}} / {{SHIFT_CODE}}	Enter the approved capture-point identifiers.	Activation/roster plan
{{SOURCE_CODE}}	Enter the unique market/date/location/shift/channel code.	Source-code register
{{INTEREST_CHOICES}}	Insert a short current list: named project, volunteer opportunity, club visit, community update or requested answer.	Current activation brief

Field	Completion instruction	Evidence
{{FOLLOW_UP_OWNER}}	Enter the owner who validates and routes records after the shift.	Workflow approval
{{FOLLOW_UP_TARGET}}	Enter the approved response target for each offered interest.	Service-level approval
{{NOTICE_VERSION}}	Enter the approved point-of-collection notice version.	Notice-control record
{{PRIVACY_URL}} / {{PRIVACY_CONTACT}}	Enter approved privacy information and correction/withdrawal routes.	Privacy review
{{PAPER_CARD_ID}}	Enter the unique card identifier for custody and system reconciliation.	Paper-custody log
{{RETENTION_TRIGGER}}	Enter the approved event-only record review/disposal trigger.	Retention schedule

Controlled public fields

Public field	Required only when	Exclude / control
Preferred name	A personal response is requested	Do not require full legal name
One interest choice	The person asks for follow-up	Use only the current approved list
One chosen contact channel and matching detail	The selected follow-up requires contact	Do not require multiple channels or private details when a professional route suffices
Specific follow-up permission	Every identifiable record	Limit permission to the selected interest/action
Optional future-update choice	Offered and approved	Separate, unselected and not required
Notice acknowledgement/date	Personal information is collected	Record notice version and capture method

Do not collect attendance, address, age, occupation, dietary, accessibility, household or membership-history fields by default. Do not add long free-text notes or details about people who did not choose to provide them.

Configured private visitor card

A quick follow-up from {{ACCOUNTABLE_ENTITY}}

Market: {{MARKET_NAME}} **Date/location/shift:** {{MARKET_DATE}} / {{MARKET_LOCATION}} / {{SHIFT_CODE}} **Source:** {{SOURCE_CODE}}
Paper card ID: {{PAPER_CARD_ID}} **Notice:** {{NOTICE_VERSION}}

How we will use your information

{{ACCOUNTABLE_ENTITY}} will use the details you choose to provide only to complete the follow-up you select below and any separate future-update choice you make. Privacy information is at {{PRIVACY_URL}}. To correct your details, withdraw a request or ask a privacy question, contact {{PRIVACY_CONTACT}}.

Preferred name: _____

Please choose one current interest: {{INTEREST_CHOICES}}

Choose one contact route:

- ☐ Email: _____
- ☐ Mobile/SMS: _____
- ☐ Telephone call: _____
- ☐ Please contact me about the specific interest selected above.
- ☐ Optional: I would also like occasional future Rotary service updates relevant to this interest.

No option is preselected. Choosing the specific follow-up does not add you to general promotions.

Acknowledgement: I have read or had explained the collection notice above. **Participant confirmation:** _____
Date: _____

Assisted-capture script

“I can help record your details. I will explain each field and mark optional choices only as you direct. We are collecting this information to complete the specific follow-up you choose. You can skip optional future updates. Before I submit it, I will read back your contact detail and choices.”

Shift transfer and action record

Card/intake ID	Source code	Interest	Contact checked	Follow-up permission	Optional update choice	Owner	Due date	Status	System transfer time
{{PAPER_CARD_ID}}	{{SOURCE_CODE}}		Yes / No	Yes / No	Yes / No	{{FOLLOW_UP_OWNER}}	{{FOLLOW_UP_TARGET}}	New	

Shift and release checklist

- ☐ CP-02 is identified as the Local Market Activation overlay under CP-14.
- ☐ Market, date, location, shift and channel source codes are active and printed/embedded correctly.
- ☐ Each visitor gets a private card/form; earlier entries cannot be seen.
- ☐ Digital, private paper and assisted routes show the same notice and choices.
- ☐ Connectivity-failure and paper-custody processes are briefed to every shift member.
- ☐ Contact details are read back; invalid or incomplete records are quarantined for correction.
- ☐ Specific follow-up and optional future updates are separate and unselected.
- ☐ Paper count, system transfer, access restriction and working-copy disposal are reconciled after each shift.
- ☐ Follow-up owners, targets, overdue review and no-further-contact suppression work end to end.
- ☐ Reporting distinguishes foot traffic, meaningful conversations, valid sign-ups and completed next steps.
- ☐ {{RETENTION_TRIGGER}} is configured and expired event-only records are reviewed.

Review record

Review domain	Reviewer	Outcome / required change	Date
Overlay and activation operations			
Privacy and purpose			
Accessibility and assisted capture			
Security and paper custody			
Follow-up and measurement			
Final approval			