



F06 CONFIGURED SUPPORTING DOCUMENT

School Partnership Proposal Template

A controlled, editable working derivative for M-T1-CP-03-SD-01. 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 — proposal only; nonbinding discussion and local specialist review required
Supporting-document code	M-T1-CP-03-SD-01
Exact derivative title	School Partnership Proposal Template
Source initiative	M-T1-CP-03 - School Partnership Program
Source initiative code	M-T1-CP-03
Source initiative title	School Partnership Program
Initiative disposition	Canonical retained
Canonical parent	M-T1-CP-03 - School Partnership Program
Canonical parent code and title	M-T1-CP-03 - School Partnership Program
Named overlay or migration label	Canonical body with approved school modules
Redirect or tombstone route	None
Family master	Playbook_F06_Partnership_Proposal_Agreement_Master.md
Family / master version	F06 / 1.0
Recorded master SHA-256	fa016ad4e5a11f96056499ddcd2cc6c5461c156b6d48068d783ddc98600e49e7
Authoritative index	Playbook_Supporting_Documents_Master_Index.md v1.1
Configured master variant	Master C — Partnership proposal narrative plus M-T1-CP-03-SD-01 school overlay
Derivative version	v0.1

DRAFT PROPOSAL — NONBINDING DISCUSSION — SUBJECT TO SCHOOL, ROTARY AND QUALIFIED LOCAL REVIEW

This template is a structured proposal aid, not legal advice, school approval, authority to collect student information or permission to begin an activity. No delivery, spending, brand use, data collection, public announcement or reliance begins from this proposal.

Adaptation note

For school leadership and the staff member authorised to assess external programs. Begin with verified school priorities and student benefit, not Rotary recruitment. Define a possible learning, mentoring, service, leadership or career-learning outcome only after school input. Surface safeguarding, screening, supervision, consent, privacy, image, access, safety, transport and insurance review early. Student participation or data must not be used for membership promotion without a separate approved basis.

Instructions

1. Complete a discovery meeting and proportionate partner-fit review before externalising the proposal.
 2. Verify the school/education entity, decision-maker and approval path; do not assume a teacher or parent can authorise the partnership.
 3. Label assumptions as assumptions, identify verification owners/dates and offer a proportionate pilot where appropriate.
 4. State age/year group, group size, venue, timing and curriculum/co-curricular fit only after the school confirms them.
 5. Complete required safeguarding, screening, supervision, consent, data/privacy, access, safety, transport and insurance modules even when the proposal says “to be confirmed”.
 6. Keep student/family/staff personal information out of the proposal. Use only aggregate planning facts and approved secure processes.
 7. Resolve all double-brace fields before a reviewed external proposal is issued. Any later terms or agreement require qualified local legal review.
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Controlled fields

Field	Completion instruction	Evidence
{{PARTNERSHIP_NAME}}	Enter the approved working name without implying a new entity or endorsement.	Naming/brand approval
{{ROTARY_ENTITY}} / {{ROTARY_CONTACT}}	Enter the correct Rotary organisational name and authorised relationship lead.	Entity/governance record
{{SCHOOL_ENTITY}} / {{SCHOOL_CONTACT}}	Enter the verified school/education entity and authorised assessment contact.	School confirmation
{{SCHOOL_PRIORITY}}	State the school's verified priority in its own approved terms.	Discovery record

Field	Completion instruction	Evidence
{{NEED_OR_OPPORTUNITY}}	State the evidence-backed student/community need without deficit language.	Approved evidence register
{{STUDENT_GROUP}}	Enter only an approved aggregate age/year group and proposed group size.	School input
{{SHARED_OUTCOME}}	State one outcome within the parties' influence; avoid guarantees.	Approved proposal design
{{ROTARY_VALUE}} / {{SCHOOL_VALUE}}	State realistic, confirmed capabilities each party could contribute.	Capability approvals
{{PROPOSED_ACTIVITY}}	Describe the leadership, mentoring, service or career-learning activity.	Design brief
{{CURRICULUM_OR_COCURRICULAR_FIT}}	Enter the school-confirmed fit or mark it as an assumption with owner/date.	School curriculum/program input
{{PILOT_SCOPE}}	State proposed dates, locations, group size, staff, outputs and pilot boundary.	Delivery design
{{EXCLUSIONS}} / {{ASSUMPTIONS}} / {{DEPENDENCIES}}	State excluded activities/data/promises and all unverified dependencies.	Scope/assumption logs
{{ROTARY_ROLES}} / {{SCHOOL_ROLES}}	State proposed responsibilities without displacing school authority.	Draft RACI
{{APPROVAL_PATH}} / {{GOVERNANCE_AND_ESCALATION}}	Map school, Rotary, education-authority and specialist decisions/reviews.	Governance design
{{COSTS_AND_RESOURCES}}	State proposed cash/in-kind resources, approval status and cost allocation.	F03/finance review
{{BRAND_AND_COMMUNICATIONS}}	State proposed naming, mark, image, media and correction approvals.	Brand/communications review
{{DATA_CATEGORIES}} / {{DATA_ROLES_AND_FLOWS}}	State minimum data needs and party/system responsibilities; prefer no personal-data sharing.	Data map
{{PRIVACY_NOTICE_AND_CONSENT}}	Insert only the route approved by school, privacy and legal reviewers.	Privacy/legal review

Field	Completion instruction	Evidence
{{SAFEGUARDING_REQUIREMENTS}} / {{SCREENING_OR_CHECK_REQUIREMENTS}}	State applicable approved policies, screening, training and reporting routes.	School/safeguarding review
{{SUPERVISION_MODEL}} / {{CONSENT_RELEASE_ROUTE}}	State the school-approved supervision/handoff and participant/guardian/image consent processes.	School/safeguarding/privacy review
{{ACCESS_PROVISIONS}}	State confirmed physical, communication, sensory and participation provisions.	Accessibility review
{{SAFETY_TRANSPORT_AND_INCIDENT}}	Allocate venue, equipment, transport, emergency, incident and stop-work responsibilities.	Safety/transport plan
{{INSURANCE_REQUIREMENTS}}	Insert only requirements/coverage confirmed by risk, insurance and legal review.	Insurance/legal review
{{MEASURES_AND_REVIEW}}	Define baseline, outputs, quality, outcome, risk and review approach without impact inflation.	Measurement plan
{{NEXT_STEP}} / {{NEXT_STEP_OWNER}} / {{NEXT_STEP_DUE_DATE}}	State one approved next-stage decision and owner/date.	Partnership action record
{{VERSION_ID}} / {{APPROVAL_DATE}} / {{REVIEWERS}}	Enter controlled proposal version, stage approval date and reviewers.	Document/approval register

Configured proposal body

Draft Proposal — Nonbinding Discussion — Subject to Approval and Local Legal Review

Asset: M-T1-CP-03-SD-01 — School Partnership Proposal Template **Version:** {{VERSION_ID}} **Stage approval date:** {{APPROVAL_DATE}} **Reviewers:** {{REVIEWERS}}

1. Executive proposition

{{ROTARY_ENTITY}} and {{SCHOOL_ENTITY}} are exploring **{{PARTNERSHIP_NAME}}** in response to {{NEED_OR_OPPORTUNITY}} and the school priority {{SCHOOL_PRIORITY}}.

The proposed shared outcome is {{SHARED_OUTCOME}} for {{STUDENT_GROUP}}.

{{ROTARY_ENTITY}} could contribute {{ROTARY_VALUE}}. {{SCHOOL_ENTITY}} could contribute {{SCHOOL_VALUE}}. These possibilities remain subject to each party's approval, capability, budget, safeguarding, safety, privacy, insurance and legal review.

2. Student-centred rationale

The possible activity is {{PROPOSED_ACTIVITY}}. Its proposed curriculum or co-curricular fit is {{CURRICULUM_OR_COCURRICULAR_FIT}}.

The proposal does not recruit students or families to Rotary membership and does not authorise the collection or use of their information for promotion.

3. Proposed pilot scope

{{PILOT_SCOPE}}

Expressly excluded: {{EXCLUSIONS}}

Assumptions requiring verification: {{ASSUMPTIONS}}

Dependencies and approvals: {{DEPENDENCIES}}

4. Proposed roles and governance

Rotary responsibilities: {{ROTARY_ROLES}}

School responsibilities: {{SCHOOL_ROLES}}

Approval path: {{APPROVAL_PATH}}

Governance, decisions and escalation: {{GOVERNANCE_AND_ESCALATION}}

No operational contact may bind either party outside verified delegated authority.

5. Costs and resources

{{COSTS_AND_RESOURCES}}

No cash, in-kind contribution, reimbursement, purchase or fundraising action is authorised by this proposal.

6. Brand and communications

{{BRAND_AND_COMMUNICATIONS}}

No school or Rotary name, mark, student story, quotation, image or public announcement may be used without its specific approval route.

7. Data, privacy and consent

- **Minimum data categories:** {{DATA_CATEGORIES}}
- **Data roles and flows:** {{DATA_ROLES_AND_FLOWS}}
- **Privacy notice and consent route:** {{PRIVACY_NOTICE_AND_CONSENT}}

No student, family or staff information is collected under this proposal. Any later collection must use the school-approved minimum-data, notice, consent, access, retention and deletion process.

8. Safeguarding, supervision and participation

- **Safeguarding requirements:** {{SAFEGUARDING_REQUIREMENTS}}
- **Screening/checks and training:** {{SCREENING_OR_CHECK_REQUIREMENTS}}
- **Supervision and handoff:** {{SUPERVISION_MODEL}}
- **Participant, guardian, image and recording consent:** {{CONSENT_RELEASE_ROUTE}}
- **Access provisions:** {{ACCESS_PROVISIONS}}

9. Safety, transport and insurance

- **Safety, transport, emergency and incident responsibilities:** {{SAFETY_TRANSPORT_AND_INCIDENT}}
- **Insurance requirements/evidence:** {{INSURANCE_REQUIREMENTS}}

10. Measures and review

{{MEASURES_AND_REVIEW}}

Measures must distinguish activities and outputs from changes/outcomes and must not identify students unnecessarily.

11. Proposed next step

This proposal invites the parties to refine the design and decide whether a pilot and counsel-reviewed agreement should be prepared. It does not authorise delivery, expenditure, data sharing, brand use or public announcement.

Next step: {{NEXT_STEP}} **Owner:** {{NEXT_STEP_OWNER}} **Due date:** {{NEXT_STEP_DUE_DATE}}

School proposal review checklist

- ☐ Correct school/education and Rotary entities, contacts and authority paths are verified.
- ☐ School priority, student benefit and proposed outcome are evidence-backed and non-promotional.
- ☐ Age/year group, size, timing, venue and curriculum/co-curricular fit came from authorised school input.
- ☐ Pilot scope, exclusions, deliverables, assumptions and dependencies are explicit.
- ☐ Safeguarding policy hierarchy, screening, training, supervision, handoff and reporting routes are reviewed.
- ☐ Student/family/staff data categories, notices, consent, access, security, retention and deletion are approved or gated.
- ☐ Image, story, media and recording permissions are separate and specific.
- ☐ Access, venue, equipment, transport, incident, emergency, insurance and stop-work responsibilities are assigned.
- ☐ Costs, in-kind resources, budget authority and fundraising/gift boundaries are transparent.
- ☐ Proposal contains no membership recruitment, school-approval implication or unsupported impact claim.
- ☐ Every controlled field is resolved and all material evidence is linked.
- ☐ The external proposal is labelled nonbinding and no work begins before authorised review/agreement.

Review record

Review domain	Reviewer	Outcome / required change	Date
School authority and educational fit			
Rotary initiative and capability			
Safeguarding and supervision			
Privacy, data and consent			
Safety, transport and insurance			
Accessibility			
Finance, brand and rights			
Qualified local legal review, if required at this stage			
Final proposal-stage approval			