



F06 CONFIGURED SUPPORTING DOCUMENT

School Partnership Agreement

A controlled, editable working derivative for M-T1-CP-03-SD-04.
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 — counsel-review clause map; not approved for signature, reliance or performance
Supporting-document code	M-T1-CP-03-SD-04
Exact derivative title	School Partnership Agreement
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 F — MOU/agreement drafting structure plus M-T1-CP-03-SD-04 school overlay
Derivative version	v0.1

DRAFT — LOCAL LEGAL REVIEW REQUIRED — NOT APPROVED FOR SIGNATURE

This derivative is a school-specific issue checklist, clause map and schedule workbook for qualified local counsel. It is not legal advice and is not the signed agreement itself. Do not insert signature blocks, sign, rely on, announce or begin performance until all reviews, schedules, authority evidence and counsel-approved wording are complete.

Adaptation note

Use to prepare the counsel-review clause map and schedules for an approved school partnership. Cover correct education/school and Rotary parties and authority; activity purpose and student group; responsibilities; safeguarding, screening, supervision and handoff; consent, data, images and access; venue, safety, transport and insurance; costs, gifts and conflicts; complaints, suspension, cancellation, change, expiry, exit and record handover. Qualified local legal review and authorised signatures are mandatory.

Instructions

1. Begin only after the school proposal, fit review and internal decision to draft an agreement are documented.

2. Verify the correct legal/organisational parties, education-authority requirements, addresses, identifiers and signatory authority from authoritative records.
3. Give this completed clause map and all schedules to qualified local counsel. Counsel determines binding wording, governing law, liability, indemnity, notices, dispute process and any separate data/confidentiality instrument.
4. Do not use generic wording to transfer safeguarding, safety, supervision, privacy or legal duties that cannot lawfully or operationally be transferred.
5. Keep restricted student, family, staff, screening, incident and safeguarding records outside this drafting workbook; reference approved processes only.
6. Reconcile every schedule with the body after legal review. A change to scope, roles, dates, data, costs, risk or rights requires formal change control.
7. Do not release a signature version until unresolved fields are zero and the legal/signature gate is complete.

Controlled fields

Field	Completion instruction	Evidence
{{AGREEMENT_NAME}} / {{LEGAL_STATUS_WORDING}}	Enter the counsel-approved instrument title and legal status wording.	Qualified local legal review
{{ROTARY_LEGAL_NAME}} / {{ROTARY_IDENTIFIER}} / {{ROTARY_ADDRESS}}	Enter verified Rotary party details.	Entity/authority record
{{SCHOOL_LEGAL_NAME}} / {{SCHOOL_IDENTIFIER}} / {{SCHOOL_ADDRESS}}	Enter the correct school/education-authority party details.	Education/school entity record
{{ROTARY_AUTHORISED_CONTACT}} / {{SCHOOL_AUTHORISED_CONTACT}}	Enter approved operational relationship contacts and authority limits.	Governance approval
{{BACKGROUND_AND_PURPOSE}} / {{SHARED_OUTCOME}}	State verified context, student-centred purpose and outcome without guarantees.	Approved proposal
{{STUDENT_GROUP}}	State approved aggregate age/year group and size; no personal list.	School approval
{{ACTIVITY_SCOPE}} / {{SCOPE_EXCLUSIONS}} / {{DELIVERABLES}}	Define activities, dates, locations, outputs, exclusions and acceptance.	Approved scope schedule
{{ROTARY_ROLES}} / {{SCHOOL_ROLES}}	Allocate pre-, during- and post-activity responsibilities.	RACI/governance approval
{{GOVERNANCE_AND_DECISIONS}} / {{ESCALATION_ROUTE}}	State meetings, reserved matters, authority limits and escalation.	Governance/legal review
{{COSTS_MATERIALS_AND_GIFTS}}	State cash/in-kind, materials, procurement, fundraising, gifts, approvals and exit treatment.	Finance/legal review
{{BRAND_COMMUNICATIONS_AND_ENDORSEMENT}}	State mark, naming, publicity, correction and no-implied-endorsement controls.	Brand/communications/legal review
{{DATA_PRIVACY_AND_SECURITY}}	State minimum categories, purposes, roles, systems, access, notices, consent, retention, deletion and incidents.	Data map/privacy/security/legal review
{{IP_CONTENT_AND_RIGHTS}}	State background/new IP, licences, student work, images, recordings, credits and third-party rights.	Rights/legal review
{{SAFEGUARDING_POLICY_HIERARCHY}} / {{SCREENING_AND_TRAINING}}	State applicable policies, checks, training, reporting and record boundaries.	School/safeguarding/legal review

Field	Completion instruction	Evidence
{{SUPERVISION_AND_HANDOFF}}	State approved ratios/model, attendance, arrival, departure, transport and authorised handoff.	School/safeguarding/transport review
{{CONSENT_AND_RELEASES}}	State participant/guardian, activity, data, image, recording and story consent routes.	School/privacy/rights review
{{ACCESS_AND_PARTICIPATION}}	State school-led adjustment planning and confirmed provisions.	Accessibility/school review
{{SAFETY_EMERGENCY_AND_INCIDENT}}	Allocate venue, equipment, risk, emergency, first response, incident and stop-work roles.	Safety/school/legal review
{{INSURANCE_REQUIREMENTS}}	Enter reviewed evidence, limits, exclusions and responsibilities only.	Insurance/risk/legal review
{{CONFLICTS_AND_CONDUCT}}	State declarations, gifts, recusal, complaints, conduct and escalation controls.	Governance/legal review
{{MEASURES_REPORTING_AND_RECORDS}}	Define baseline, measures, reporting, official records, access and review.	Measurement/records approval
{{START_DATE}} / {{END_DATE}} / {{REVIEW_DATES}}	Enter counsel-reviewed term and review dates; no early commencement.	Approval/legal record
{{CHANGE_SUSPENSION_AND_CANCELLATION}}	State formal variation and immediate safeguarding/safety suspension/cancellation routes.	Governance/risk/legal review
{{EXIT_AND_HANDOVER}}	State participant continuity, data, money, assets, communications and record close-out.	Close-out/legal review
{{DISPUTES_NOTICES_AND_LAW}}	Insert only counsel-drafted dispute, notice and governing-law provisions.	Qualified local legal review
{{SURVIVING_TERMS}}	Identify only terms counsel confirms survive expiry/termination.	Qualified local legal review
{{LEGAL_REVIEWER_AND_DATE}}	Enter qualified local counsel and completed review date.	Legal review record
{{ROTARY_SIGNATORY}} / {{SCHOOL_SIGNATORY}}	Enter names, titles and authority only after approval.	Signatory authority records
{{VERSION_ID}} / {{APPROVAL_DATE}} / {{REVIEWERS}}	Enter controlled drafting-stage version, approval date and reviewer list.	Document register

Configured counsel-review clause map

Asset: M-T1-CP-03-SD-04 — School Partnership Agreement **Version:** {{VERSION_ID}} **Drafting-stage approval date:** {{APPROVAL_DATE}} **Reviewers:** {{REVIEWERS}}

1. Title, legal status, parties and dates

Counsel to draft {{AGREEMENT_NAME}} with legal status {{LEGAL_STATUS_WORDING}}.

- **Rotary party:** {{ROTARY_LEGAL_NAME}}; identifier {{ROTARY_IDENTIFIER}}; address {{ROTARY_ADDRESS}}

- **School/education party:** {{SCHOOL_LEGAL_NAME}}; identifier {{SCHOOL_IDENTIFIER}}; address {{SCHOOL_ADDRESS}}
- **Operational contacts:** {{ROTARY_AUTHORISED_CONTACT}} / {{SCHOOL_AUTHORISED_CONTACT}}
- **Proposed term:** {{START_DATE}} to {{END_DATE}}
- **Review dates:** {{REVIEW_DATES}}

Counsel to verify capacity, notice details, commencement conditions and signatory authority.

2. Background, purpose and student group

{{BACKGROUND_AND_PURPOSE}}

Shared outcome: {{SHARED_OUTCOME}} **Approved aggregate student group:** {{STUDENT_GROUP}}

The agreement must not imply guaranteed educational, service or community impact.

3. Scope, exclusions and deliverables

Included activity: {{ACTIVITY_SCOPE}}

Express exclusions: {{SCOPE_EXCLUSIONS}}

Deliverables, quality and acceptance: {{DELIVERABLES}}

Attach Schedule 1 and ensure dates, locations, year/age group, staff, activity boundaries and acceptance criteria agree with the clause body.

4. Roles, governance and authority

- **Rotary responsibilities:** {{ROTARY_ROLES}}
- **School responsibilities:** {{SCHOOL_ROLES}}
- **Governance and decisions:** {{GOVERNANCE_AND_DECISIONS}}
- **Escalation:** {{ESCALATION_ROUTE}}

State that operational contacts cannot bind a party outside delegated authority and that school authority over students and school operations is not displaced.

5. Contributions, costs, materials and gifts

{{COSTS_MATERIALS_AND_GIFTS}}

Counsel/finance review must address procurement, fundraising, reimbursements, overruns, unspent funds, materials, gifts, tax position and exit treatment.

6. Brand, communications and endorsement

{{BRAND_COMMUNICATIONS_AND_ENDORSEMENT}}

Protect both parties' names/marks, require proof approval, prevent implied endorsement and define correction, withdrawal and post-exit cessation.

7. Data, privacy, confidentiality and security

{{DATA_PRIVACY_AND_SECURITY}}

Counsel determines whether a separate data-processing/confidentiality instrument is needed. The clause/schedule must minimise student, family and staff data and preserve the school-approved access, consent and correction routes.

8. IP, student work, content and third-party rights

{{IP_CONTENT_AND_RIGHTS}}

Address pre-existing materials, student-created work, new content, licences, attribution, modification, image/recording use, moral-rights consents where applicable and cessation/return.

9. Safeguarding, screening, supervision and handoff

- **Policy hierarchy and reporting:** {{SAFEGUARDING_POLICY_HIERARCHY}}
- **Screening/checks and training:** {{SCREENING_AND_TRAINING}}
- **Supervision, attendance, transport and handoff:** {{SUPERVISION_AND_HANDOFF}}
- **Participant/guardian/data/image/recording consent:** {{CONSENT_AND_RELEASES}}

The agreement must identify restricted-record owners without attaching screening results, incident narratives or personal safeguarding information.

10. Accessibility and participation

{{ACCESS_AND_PARTICIPATION}}

Use the school's approved adjustment route and do not require unnecessary diagnosis disclosure to Rotary.

11. Safety, emergency, incidents and insurance

- **Safety/emergency/incident responsibilities:** {{SAFETY_EMERGENCY_AND_INCIDENT}}
- **Insurance evidence and allocation:** {{INSURANCE_REQUIREMENTS}}

Counsel/risk reviewers must address venue control, equipment, first response, stop-work, factual incident reporting and non-transferable duties.

12. Conflicts, conduct and complaints

{{CONFLICTS_AND_CONDUCT}}

Include disclosure, gifts, related parties, recusal, prohibited conduct, complaint ownership and escalation without bypassing school safeguarding or complaint processes.

13. Measures, reporting and records

{{MEASURES_REPORTING_AND_RECORDS}}

Measures must distinguish attendance/activity from outcome and minimise identifiable student reporting.

14. Change, suspension, cancellation and exit

- **Change, suspension and cancellation:** {{CHANGE_SUSPENSION_AND_CANCELLATION}}
- **Exit and handover:** {{EXIT_AND_HANDOVER}}
- **Surviving terms:** {{SURVIVING_TERMS}}

Address immediate safeguarding/safety action, participant continuity, open activities, information, money, materials, public statements and official records.

15. Disputes, notices and law

{{DISPUTES_NOTICES_AND_LAW}}

Only qualified local counsel may draft the governing-law/jurisdiction, notices, dispute, liability, indemnity, force-majeure, assignment, waiver, severability, electronic-signature and entire-agreement provisions.

Configured schedules

Schedule 1 — Activity scope and acceptance

Work package/activity	Student group	Date/location	Output	Acceptance evidence	Exclusion	Dependency	Owner

Schedule 2 — RACI, authority and handoff

Activity/decision	Rotary role	School role	Specialist reviewer	Authority limit	Handoff/approval evidence
Activity approval					
Student supervision/handoff			Safeguarding reviewer		
Spending/materials			Finance reviewer		
Data/consent			Privacy/legal reviewer		
Images/publication			Brand/rights reviewer		
Safety/incident action			Safety reviewer		
Change/suspension/exit			Governance/legal reviewer		

Schedule 3 — Safeguarding, consent, safety and access controls

Control	Applicable policy/process	Responsible party	Evidence/version	Review trigger	Escalation
Screening/checks/training					
Supervision/attendance/handoff					
Participant/guardian consent					
Image/recording/story release					
Access/adjustment planning					
Venue/equipment/emergency					
Incident/safeguarding report					

Control	Applicable policy/process	Responsible party	Evidence/version	Review trigger	Escalation
Insurance evidence					

Schedule 4 — Data, content and records

Category/content	Purpose	Collector/controller/access	System/transfer	Notice/consent	Retention/deletion	Rights/licence

Schedule 5 — Contributions and budget

Contribution	Provider	Cash/in-kind	Approved amount/value method	Timing	Conditions	Acceptance evidence	Exit treatment

Legal-review and signature gate

- ☐ {{LEGAL_REVIEWER_AND_DATE}} is complete and counsel-approved wording is incorporated.
- ☐ Correct parties, identifiers, addresses, education-authority requirements and authority are verified.
- ☐ Every schedule agrees with the clause body and has an accountable owner.
- ☐ School/Rotary internal approvals for education, safeguarding, privacy, safety, access, insurance, finance, brand, rights and records are complete.
- ☐ No restricted personal or screening record is attached to the drafting workbook.
- ☐ All double-brace fields are resolved in the counsel-reviewed candidate.
- ☐ The authorised signatories are verified as {{ROTARY_SIGNATORY}} and {{SCHOOL_SIGNATORY}}.
- ☐ The exact signature version checksum and authority evidence are retained.
- ☐ No activity, expenditure, data sharing, mark use or announcement begins before valid execution and commencement conditions.

No signature block is included in this REVIEW derivative.

Review record

Review domain	Reviewer	Outcome / required change	Date
School/education entity and authority			
Rotary entity and authority			
Safeguarding, supervision and handoff			
Privacy, data, consent and security			
Safety, transport and insurance			
Accessibility			
Finance, conflicts, brand and rights			
Qualified local legal review			
Signature-version reconciliation			