



F06 CONFIGURED SUPPORTING DOCUMENT

Business Partnership Proposal Template

A controlled, editable working derivative for M-T1-CP-09-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 specialist review required
Supporting-document code	M-T1-CP-09-SD-01
Exact derivative title	Business Partnership Proposal Template
Source initiative	M-T1-CP-09 - Local Business Partnership Drive
Source initiative code	M-T1-CP-09
Source initiative title	Local Business Partnership Drive
Initiative disposition	Canonical retained with new title
Canonical parent	M-T1-CP-09 - Local Partnership Discovery and Development
Canonical parent code and title	M-T1-CP-09 - Local Partnership Discovery and Development
Named overlay or migration label	Business Outreach remains a named mode
Redirect or tombstone route	Permanent title alias from Local Business Partnership Drive to M-T1-CP-09 — Local Partnership Discovery and Development; retain M-T1-CP-09-SD-01 as the stable asset code
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-09-SD-01 business overlay
Derivative version	v0.1

DRAFT PROPOSAL — NONBINDING DISCUSSION — SUBJECT TO APPROVAL AND QUALIFIED LOCAL REVIEW

This proposal does not authorise work, spending, payment, fundraising, brand use, data/contact sharing, public announcement or reliance. It is not legal, tax, financial or insurance advice.

Adaptation note

For a business owner, executive or delegated community-investment/partnership decision-maker. Lead with a verified shared community outcome and explain why the business's capability is relevant without flattery or assumed interest. Distinguish cash sponsorship, in-kind support, employee volunteering, expertise, venue, reach and referral. Control cost, valuation, authority, brand acknowledgement, data/contact sharing, procurement, tax, fundraising, conflicts and insurance. Keep Rotary membership separate from the partnership ask.

Instructions

1. Complete discovery, authority verification and proportionate due diligence before issuing an external proposal.
 2. Use the current canonical Local Partnership Discovery and Development title; Business Outreach may remain a named mode.
 3. State mutual community value and beneficiary value before describing contributions. Do not treat the business as a funding source by default.
 4. Separate every proposed contribution category and record amount/value method, authority, conditions, evidence, timing and exit treatment.
 5. Separate acknowledgement from advertising or endorsement; no mark or public announcement accompanies an unapproved proposal.
 6. Map data/contact sharing and referral boundaries explicitly. A professional discussion does not authorise unrelated marketing or membership promotion.
 7. Offer a proportionate pilot and a real review/exit path. Resolve all fields and material evidence before external review.
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Controlled fields

Field	Completion instruction	Evidence
{{PARTNERSHIP_NAME}}	Enter the approved working name without implying a new entity/endorsement.	Naming/brand approval
{{ROTARY_ENTITY}} / {{ROTARY_CONTACT}}	Enter the correct Rotary entity and authorised lead.	Entity/governance records
{{BUSINESS_ENTITY}} / {{BUSINESS_CONTACT}}	Enter the verified business entity and decision-maker/authority.	Partner entity/written confirmation
{{NEED_OR_OPPORTUNITY}}	State the evidence-backed community need/opportunity.	Approved evidence register
{{SHARED_OUTCOME}} / {{BENEFICIARY_OR_AUDIENCE}}	State one achievable shared outcome and intended beneficiaries without guarantee/deficit language.	Approved proposal design
{{ROTARY_VALUE}} / {{BUSINESS_VALUE}}	State realistic capabilities each party could contribute.	Capability evidence/partner confirmation
{{BUSINESS_RELEVANCE}}	Explain specific capability fit without flattery or assumed interest.	Discovery/due-diligence record

Field	Completion instruction	Evidence
{{PILOT_SCOPE}} / {{SCOPE_EXCLUDED}}	State included pilot activities, locations, outputs, exclusions and limits.	Scope approval
{{DELIVERABLES}} / {{ASSUMPTIONS}} / {{DEPENDENCIES}}	Define outputs/acceptance and every unverified dependency with owner/date.	Delivery/assumption logs
{{ROTARY_ROLES}} / {{BUSINESS_ROLES}}	State proposed responsibilities.	Draft RACI/partner confirmation
{{GOVERNANCE_DECISIONS_AND_ESCALATION}}	State leads, meetings, authority limits, reserved/joint decisions and escalation.	Governance review
{{CASH_SUPPORT}} / {{IN_KIND_SUPPORT}} / {{EMPLOYEE_VOLUNTEERING}} / {{EXPERTISE_VENUE_REACH_REFERRAL}}	Separate proposed contribution categories.	Contribution design/partner confirmation
{{COST_VALUE_AUTHORITY_AND_EVIDENCE}}	State costs, valuation method, approvals, conditions, payment/invoice and evidence.	Finance/procurement review
{{TAX_FUNDRAISING_AND_PROCUREMENT_REVIEW}}	Insert only professionally reviewed positions or clearly list unresolved reviews.	Finance/tax/legal review
{{BRAND_ACKNOWLEDGEMENT}} / {{COMMUNICATIONS_APPROVAL}}	Define acknowledgement, marks, advertising/endorsement boundary, spokespeople and correction.	Brand/communications/legal review
{{DATA_AND_CONTACT_BOUNDARIES}}	State minimum categories, purposes, roles, systems, notices, consent and no-sharing position.	Data map/privacy review
{{IP_AND_RIGHTS}}	State background/new content, licences, images, marks and third-party rights.	Rights/legal review
{{SAFETY_SAFEGUARDING_AND_INSURANCE}}	State applicable activity controllers, checks, supervision, incidents and reviewed coverage.	Risk/safeguarding/insurance review
{{CONFLICT_DISCLOSURE_AND_MANAGEMENT}}	State actual/potential/perceived conflicts, gifts, related parties and recusal/approval.	Conflict record
{{BASELINE_MEASURES_AND_REPORTING}}	Define baseline, output/quality/outcome/risk measures, owner and reporting cadence.	Measurement plan
{{START_END_AND_REVIEW}}	State proposed pilot term and review points.	Governance plan
{{SUCCESS_STOP_AND_EXIT}}	State success, redesign, pause/stop thresholds and close-out treatment.	Governance/risk approval
{{NEXT_STEP}} / {{NEXT_STEP_OWNER}} / {{NEXT_STEP_DUE_DATE}}	State one approved refinement or decision action.	Partnership action record

Field	Completion instruction	Evidence
{{VERSION_ID}} / {{APPROVAL_DATE}} / {{REVIEWERS}}	Enter controlled proposal version/date/reviewers.	Document register

Configured proposal body

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

Asset: M-T1-CP-09-SD-01 — Business Partnership Proposal Template **Version:** {{VERSION_ID}} **Proposal-stage approval date:** {{APPROVAL_DATE}} **Reviewers:** {{REVIEWERS}}

1. Executive proposition

{{ROTARY_ENTITY}} and {{BUSINESS_ENTITY}} are exploring **{{PARTNERSHIP_NAME}}** in response to **{{NEED_OR_OPPORTUNITY}}**.

The proposed shared outcome is **{{SHARED_OUTCOME}}** for **{{BENEFICIARY_OR_AUDIENCE}}**.

{{ROTARY_ENTITY}} could contribute **{{ROTARY_VALUE}}**. {{BUSINESS_ENTITY}} could contribute **{{BUSINESS_VALUE}}**. These are possible contributions only and remain subject to each party's approval, capability, budget, risk and legal review.

2. Why this relationship

{{BUSINESS_RELEVANCE}}

The rationale is capability fit and community value. It is not a claim of endorsement, exclusivity, community mandate, financial return, tax treatment or interest in Rotary membership.

3. Proposed pilot scope

Included pilot: {{PILOT_SCOPE}}

Expressly excluded: {{SCOPE_EXCLUDED}}

Deliverables and acceptance: {{DELIVERABLES}}

Assumptions: {{ASSUMPTIONS}}

Dependencies: {{DEPENDENCIES}}

4. Roles and governance

- **Rotary roles:** {{ROTARY_ROLES}}
- **Business roles:** {{BUSINESS_ROLES}}
- **Governance, decisions and escalation:** {{GOVERNANCE_DECISIONS_AND_ESCALATION}}
- **Authorised contacts:** {{ROTARY_CONTACT}} / {{BUSINESS_CONTACT}}

Operational contacts cannot bind either party beyond verified delegated authority.

5. Proposed contributions, costs and approvals

Contribution category	Proposed treatment
Cash support/sponsorship	{{CASH_SUPPORT}}
In-kind goods/services	{{IN_KIND_SUPPORT}}
Employee volunteering	{{EMPLOYEE_VOLUNTEERING}}
Expertise, venue, reach or referral	{{EXPERTISE_VENUE_REACH_REFERRAL}}
Cost, valuation, authority and evidence	{{COST_VALUE_AUTHORITY_AND_EVIDENCE}}
Tax, fundraising, procurement and professional review	{{TAX_FUNDRAISING_AND_PROCUREMENT_REVIEW}}

No contribution, payment, reimbursement, purchase, donation receipt or valuation is authorised by this proposal.

6. Brand, acknowledgement and communications

- **Proposed acknowledgement and no-endorsement boundary:** {{BRAND_ACKNOWLEDGEMENT}}
- **Proof, spokesperson, publication and correction approvals:** {{COMMUNICATIONS_APPROVAL}}

No mark use, advertising, media statement or public announcement accompanies this unapproved proposal.

7. Data, contact sharing, IP and rights

- **Data/contact categories, purposes, roles, consent and sharing boundary:** {{DATA_AND_CONTACT_BOUNDARIES}}
- **Background/new content, licences and third-party rights:** {{IP_AND_RIGHTS}}

Professional contact for this proposal is separate from public referrals, participant information, broader Rotary promotion and membership contact.

8. Safety, safeguarding and insurance

{{SAFETY_SAFEGUARDING_AND_INSURANCE}}

Any activity-specific risk, screening, supervision, incident, emergency or insurance term remains subject to specialist and legal review.

9. Conflicts

{{CONFLICT_DISCLOSURE_AND_MANAGEMENT}}

No person approves a related-party contribution or benefit in which they have an unmanaged conflict.

10. Measures, term and review

- **Baseline, measures and reporting:** {{BASELINE_MEASURES_AND_REPORTING}}
- **Proposed pilot term/reviews:** {{START_END_AND_REVIEW}}
- **Success, redesign, pause/stop and exit:** {{SUCCESS_STOP_AND_EXIT}}

Activity, visibility, donations, volunteer hours or enquiries are not described as community impact without appropriate outcome evidence.

11. Proposed next step

This proposal invites refinement and an approved next-stage decision. It does not authorise performance or create an agreement.

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

Contribution schedule

Contribution	Provider	Cash/in-kind/category	Amount or value method	Authority	Timing	Conditions	Evidence/acceptance	Unused/exit treatment

Proposal review checklist

- ☐ Correct entities, decision-makers and authority limits are verified.
- ☐ Shared outcome, beneficiary value and business relevance are evidence-backed.
- ☐ Pilot scope, exclusions, deliverables, assumptions and dependencies are explicit.
- ☐ Cash, in-kind, employee, expertise, venue, reach and referral contributions are separated.
- ☐ Cost, valuation, approval, procurement, tax, fundraising, evidence and exit questions have named reviewers.
- ☐ Acknowledgement is distinct from advertising/endorsement; no unapproved mark use/public announcement occurs.
- ☐ Data/contact sharing, referrals, privacy, security, retention and incident boundaries are mapped.
- ☐ Membership promotion is absent from the partnership ask and tracking permission.
- ☐ Safety, safeguarding, insurance, rights and conflict reviews are proportionate and complete/gated.
- ☐ Pilot measures distinguish outputs from outcomes and include redesign/stop/exit thresholds.
- ☐ Every controlled field and material claim is resolved/evidenced.
- ☐ Proposal remains nonbinding discussion; it is not accompanied by payment, logo use or performance.

Review record

Review domain	Reviewer	Outcome / required change	Date
Entity, authority and partner fit			

Review domain	Reviewer	Outcome / required change	Date
Scope, capability and governance			
Finance, tax, procurement and fundraising			
Privacy, data, security and contact sharing			
Brand, communications, IP and rights			
Safety, safeguarding, insurance and conflicts			
Qualified local legal review, if required at this stage			
Final proposal-stage approval			