



F05 CONFIGURED SUPPORTING DOCUMENT

Partnership Tracking Sheet

A controlled, editable working derivative for M-T1-CP-09-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 use
Supporting-document code	M-T1-CP-09-SD-03
Exact derivative title	Partnership Tracking Sheet
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-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-09-SD-03 Partnership Tracking Sheet overlay
Derivative version	v0.1

Adaptation note

Use as the controlled internal relationship and action register for Local Partnership Discovery and Development, including the Business Outreach mode. Keep organisation records distinct from individual contact records so staff changes do not erase relationship history. Record mutual community value, boundaries, decisions and one owned next action. Link proposals and agreements to Fo6 rather than copying their sensitive contents into this tracker.

Instructions

1. Complete the privacy, purpose, access and retention review before populating the tracker.
2. Create one stable organisation ID and separate stable contact IDs. Never use a person as the organisation's only identifier.
3. Use only the controlled relationship stages below. Preserve dated stage and action history rather than overwriting prior decisions.
4. Record verified professional information, the source/context of introduction and the person's stated communication preference.
5. Do not collect or infer personal wealth, political affiliation, family circumstances, health, reputation scores or speculative personality commentary.
6. Store only links and status metadata for proposals/agreements; keep Fo6 documents and sensitive due-diligence evidence in their controlled locations.
7. Review inactive relationships, access and contact accuracy at each partnership review point and on staff/contact change.

Controlled configuration fields

Field	Completion instruction	Evidence
{{ACCOUNTABLE_ENTITY}}	Enter the club or District unit accountable for partnership development.	Initiative approval
{{BUSINESS_OWNER}}	Enter the accountable Partnership Lead or delegate.	Governance approval
{{DATA_CUSTODIAN}}	Enter the owner of system access, quality, retention and disposal.	Privacy/system approval
{{APPROVED_SYSTEM}}	Enter the controlled system and storage location.	Security review
{{SOURCE_CODE_REGISTER}}	Enter approved introduction/campaign source codes.	Source-code register
{{REVIEW_CADENCE}}	Enter the relationship, data-quality and access-review cadence.	Governance/retention approval
{{RETENTION_TRIGGER}}	Enter the approved closure and disposal/de-identification trigger.	Retention schedule
{{PROPOSAL_REPOSITORY}}	Enter the controlled F06 proposal/agreement location.	Records approval
{{PRIVACY_CONTACT}}	Enter the route for correction, preference change or concern.	Privacy review

Controlled fields and values

Field	Purpose	Control
Organisation ID	Stable relationship identifier	Required; never reassigned
Organisation name, sector and public route	Identify the entity and approved public channel	Verify from authoritative/public source
Shared community priority	Record the evidence-backed area of mutual interest	Avoid vague fundraising labels
Proposed contribution	Record cash, in-kind, expertise, venue, people or reach as a proposal only	Link authority/evidence; never assume commitment
Relationship owner	Establish accountability	One named owner with backup
Stage	Control workflow	Prospect identified / Discovery agreed / Opportunity qualified / Proposal active / Agreement active / Review due / Closed
Contact ID, name, role and professional route	Maintain an authorised working contact	Keep separate from entity record and verify source
Communication preference and scope	Respect stated professional contact choice	Separate from broader club communications
Meeting/action history	Preserve factual decisions, actions and dates	Append-only; no speculative notes
F06 document links	Connect approved proposal/agreement records	Link only; do not paste sensitive contents
Next decision, owner and due date	Drive a concrete next step	Required for every active stage
Close reason and retention review	End dormant/declined relationships responsibly	Preserve minimum audit/suppression evidence only

Configured organisation relationship register

Organisation ID	Organisation name	Sector	Public contact route	Shared community priority	Proposed contribution	Relationship owner	Stage	Next decision	Owner	Due date	Last review	Status
							Prospect identified					Active

Configured contact register

Contact ID	Organisation ID	Name	Role	Professional contact route	Source/context of introduction	Stated communication preference and scope	Current / former	Verified date	Replacement/introduction record
							Current		

Do not copy a former contact's preferences to a replacement. Transfer the relationship through a documented introduction or approved process while preserving the history.

Configured decision and action history

Action ID	Organisation ID	Contact ID	Date/time	Stage before	Factual discussion or decision	Agreed action	Action owner	Due date	Stage after	Evidence link

F06 and review links

Organisation ID	Discovery/due-diligence link	Proposal code/version/link	Agreement code/version/link	Approval status	Next review date	Access owner
						{{DATA_CUSTODIAN}}

The controlled Fo6 repository is {{PROPOSAL_REPOSITORY}}. Record links, status and review dates here; do not reproduce confidential terms, legal advice or restricted evidence.

Contact preference history

Preference ID	Contact ID	Purpose/channel	Choice	Wording/source	Date	Recorded by	Change/withdrawal date	Suppression applied
		Partnership discussion	Requested / Not requested					
		Broader club communications	Yes / No					

Tracker review checklist

- ☐ The current canonical title and Business Outreach mode are used consistently.
- ☐ Organisation and contact records have separate stable IDs and access rules.
- ☐ Source/context, professional contact accuracy and communication scope are evidenced.
- ☐ Controlled stages are used; every active record has a next decision, owner and due date.
- ☐ Action and stage history is appended, not silently overwritten.
- ☐ Tracker notes are factual, necessary and respectful; prohibited profiling is absent.
- ☐ Fo6 proposals, agreements and due-diligence evidence are linked rather than copied.
- ☐ Contact changes preserve organisation history without inheriting the former contact's preferences.
- ☐ {{REVIEW_CADENCE}} includes inactive-record, access, data-quality and contact-accuracy review.
- ☐ No-further-contact requests propagate to each authorised communications route.
- ☐ {{RETENTION_TRIGGER}} and close-out controls are configured in {{APPROVED_SYSTEM}}.
- ☐ Export, sharing, backup and deletion permissions are limited to named roles.

Review record

Review domain	Reviewer	Outcome / required change	Date
Initiative and relationship workflow			
Privacy and contact preferences			
System security and access			
F06 records linkage			
Retention and close-out			
Final approval			