



F04 CONFIGURED SUPPORTING DOCUMENT

# Invitation Template

A controlled, editable working derivative for M-T1-CP-15-SD-02.  
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.

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## Release control

| Field                            | Controlled value                                                                                        |
|----------------------------------|---------------------------------------------------------------------------------------------------------|
| Status                           | <b>REVIEW — configured derivative; not approved for distribution</b>                                    |
| Derivative version               | v0.1                                                                                                    |
| Supporting-document code         | M-T1-CP-15-SD-02                                                                                        |
| Exact derivative title           | Invitation Template                                                                                     |
| Source initiative                | M-T1-CP-15 - Neighbourhood Rotary Conversations                                                         |
| Source initiative code           | M-T1-CP-15                                                                                              |
| Source initiative title          | Neighbourhood Rotary Conversations                                                                      |
| Initiative disposition           | Absorbed as overlay                                                                                     |
| Canonical parent                 | M-T1-CP-12 - Community Listening Sessions                                                               |
| Canonical parent code and title  | M-T1-CP-12 - Community Listening Sessions                                                               |
| Named overlay or migration label | Neighbourhood Small-Group Conversation                                                                  |
| Redirect or tombstone route      | Permanent overlay alias from M-T1-CP-15 to M-T1-CP-12; retain M-T1-CP-15-SD-02 as the stable asset code |
| Family master                    | Playbook_F04_Invitations_Promotion_Follow_Up_Master.md                                                  |
| Family / master version          | F04 / 1.0                                                                                               |
| Recorded master SHA-256          | d4929a7b2b9449751d9999421963dbeff02e8c6c6d867dfcae66623e9446df69                                        |
| Authoritative index              | Playbook_Supporting_Documents_Master_Index.md v1.1                                                      |
| Configured master variant        | Master A — shortened personal invitation; CP-12 listening controls inherited                            |

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## Adaptation note

For a small, clearly defined neighbourhood audience and an informal local conversation. Use a short, personal form. Name the real neighbourhood connection, small-group format, host, capacity, exact location-sharing approach and safety/access arrangements. Avoid institutional language and a mass-mail

tone. The primary action is to accept, decline or suggest a locally relevant issue through the approved route. Follow with personal thanks and the one promised local action; do not transfer recipients automatically to general promotions.

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## Instructions

1. Use only for the Neighbourhood Small-Group Conversation overlay under M-T1-CP-12. Keep the stable CP-15 supporting-document code.
2. Invite a defined local segment through an approved relationship or public opt-in route; do not scrape neighbourhood contact details.
3. Keep the message short and personal while retaining scope, input handling, privacy, access, safety and report-back facts.
4. Publish a full address in the invitation only when the host and safety plan permit it. Otherwise state the approved location-sharing process.
5. Record accept, decline and no-further-contact outcomes. A local conversation does not grant permission for a general Rotary mailing list.
6. Resolve every controlled field and have the host, Initiative Lead, Privacy Reviewer and Accessibility Reviewer approve the final version.

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## Controlled fields

| Field                                                               | Completion instruction                                                                  | Evidence                        |
|---------------------------------------------------------------------|-----------------------------------------------------------------------------------------|---------------------------------|
| {{FIRST_NAME}}                                                      | Use the preferred name from an authorised relationship record.                          | Contact record                  |
| {{HOST_ENTITY}} / {{LOCAL_HOST_NAME}}                               | Enter the accountable Rotary entity and the approved local host.                        | Initiative and host approval    |
| {{NEIGHBOURHOOD_CONNECTION}}                                        | State the real local connection that makes the invitation relevant.                     | Audience/relationship plan      |
| {{PUBLIC_EVENT_NAME}}                                               | Enter the approved small-group conversation title.                                      | Session brief                   |
| {{LOCAL_PURPOSE}}                                                   | State the local question or issue the host wants to understand.                         | Listening brief                 |
| {{TOPICS_IN_SCOPE}}                                                 | Name the approved issues that can be discussed.                                         | Facilitation plan               |
| {{INPUT_AND_REPORT_BACK}}                                           | Explain note-taking, attribution, use of input and the one promised report-back action. | Privacy and follow-up plan      |
| {{EVENT_DATE_LONG}} / {{START_TIME}} / {{END_TIME}} / {{TIME_ZONE}} | Enter complete confirmed timing.                                                        | Host confirmation and run sheet |

| Field                                                                 | Completion instruction                                                                                 | Evidence                          |
|-----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|-----------------------------------|
| {{LOCATION_SHARING_APPROACH}}                                         | Enter the approved venue/address or explain when and how confirmed guests receive it.                  | Site and safety plan              |
| {{CAPACITY_TEXT}}                                                     | State the real small-group limit and waitlist arrangement.                                             | Host/session approval             |
| {{ACCESSIBILITY_SUMMARY}} /<br>{{ACCESSIBILITY_CONTACT}}              | State specific provisions and a monitored adjustment/alternative route.                                | Accessibility review              |
| {{SAFETY_AND_PARTICIPATION}}                                          | State approved arrival, household/site, supervision or conduct information without unnecessary detail. | Safety/host brief                 |
| {{RSVP_DEADLINE}} / {{RSVP_URL}} /<br>{{RSVP_EMAIL}} / {{RSVP_PHONE}} | Enter the deadline and tested response/human contact routes.                                           | Registration plan and link tests  |
| {{PRIMARY_CONTACT_NAME}} /<br>{{PRIMARY_CONTACT_EMAIL}}               | Enter the approved follow-up owner.                                                                    | Contact approval                  |
| {{PRIVACY_NOTICE_URL}} /<br>{{PREFERENCE_ROUTE}}                      | Enter tested privacy and preference routes.                                                            | Privacy and communications review |

## Configured neighbourhood invitation

**Subject:** A small neighbourhood conversation on {{EVENT\_DATE\_LONG}}

Hello {{FIRST\_NAME}},

I'm {{LOCAL\_HOST\_NAME}}, writing with {{HOST\_ENTITY}} because {{NEIGHBOURHOOD\_CONNECTION}}.

I'd like to invite you to **{{PUBLIC\_EVENT\_NAME}}**, a small, informal conversation about {{LOCAL\_PURPOSE}}.

We'll keep the group to {{CAPACITY\_TEXT}} so everyone has room to contribute. The discussion can cover {{TOPICS\_IN\_SCOPE}}.

### How input will be used

{{INPUT\_AND\_REPORT\_BACK}}

This is a listening conversation, not a promise that every suggestion will be adopted and not a request to join Rotary.

**When:** {{EVENT\_DATE\_LONG}}, {{START\_TIME}}–{{END\_TIME}} {{TIME\_ZONE}} **Where:** {{LOCATION\_SHARING\_APPROACH}} **Access:** {{ACCESSIBILITY\_SUMMARY}} **Safety and participation:** {{SAFETY\_AND\_PARTICIPATION}}

Please accept, decline or suggest a locally relevant issue by {{RSVP\_DEADLINE}} at {{RSVP\_URL}}. You can also email {{RSVP\_EMAIL}} or call {{RSVP\_PHONE}}.

For an adjustment or another approved way to contribute, contact {{ACCESSIBILITY\_CONTACT}}.

Warm regards,

{{PRIMARY\_CONTACT\_NAME}} {{HOST\_ENTITY}} {{PRIMARY\_CONTACT\_EMAIL}}

Privacy information: {{PRIVACY\_NOTICE\_URL}} Communication preferences:  
{{PREFERENCE\_ROUTE}}

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## Host and distribution checklist

- ☐ CP-15 is presented as the Neighbourhood Small-Group Conversation overlay under CP-12, not as a separate canonical initiative.
- ☐ Each recipient has an approved local relationship or opt-in basis and a truthful neighbourhood connection.
- ☐ Group size, local scope, facilitation, input handling and report-back promise are confirmed.
- ☐ The location-sharing method protects the host and participants while giving confirmed guests sufficient decision information.
- ☐ Specific access, alternative-participation and safety routes are approved and monitored.
- ☐ Accept, decline and issue-suggestion routes have been tested on mobile and with keyboard-only use.
- ☐ No recipient will be transferred to general promotion without separate recorded permission.
- ☐ Personal thanks and the one promised local action have owners and due dates.
- ☐ The final message uses a personal tone, contains no institutional filler and has no unresolved double-brace fields.
- ☐ Host, Initiative Lead, Communications, Privacy and Accessibility reviews are recorded.

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## Review record

| Review domain                      | Reviewer | Outcome / required change | Date |
|------------------------------------|----------|---------------------------|------|
| Canonical overlay and local scope  |          |                           |      |
| Host, location and safety          |          |                           |      |
| Communications and proof           |          |                           |      |
| Privacy and audience permission    |          |                           |      |
| Accessibility and response pathway |          |                           |      |
| Final approval                     |          |                           |      |