



F01 CONFIGURED SUPPORTING DOCUMENT

Help Desk Setup Guide

A controlled, editable working derivative for M-T1-CP-16-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.

F01 configured review derivative

Status: REVIEW - configured working derivative; not approved for event delivery or public distribution **Theme:** Attraction and Visibility **Sub-theme:** Community Presence and Visibility **Index authority:** Supporting Documents Master Index and Release Manifest v1.1, issued 2 August 2026

1. Controlled identity and migration metadata

Controlled field	Configured entry
Supporting-document code	M-T1-CP-16-SD-01
Exact derivative title	Help Desk Setup Guide
Exact supporting-document title	Help Desk Setup Guide
Status	REVIEW - configured working derivative; local facts, approval, rendering and release evidence remain required
Family / master version	F01 - Event and Activation Planning / 1.0
Recorded master SHA-256	bac1b73d70b763d279faeb8502b398eb0ea059303afce5bff2a1f585eabb0ee
Authoritative index	Playbook_Supporting_Documents_Master_Index.md v1.1, issued 2 August 2026
Configured master variant	M-T1-CP-16-SD-01 - Help Desk Setup Guide; F01 Section 23 mandatory overlay incorporated in full
Source initiative	M-T1-CP-16 - Rotary Community Help Desk
Source initiative code	M-T1-CP-16
Source initiative title	Rotary Community Help Desk
Source initiative code/title	M-T1-CP-16 - Rotary Community Help Desk
Initiative disposition	Absorbed as restricted overlay
Canonical parent	M-T1-CP-14 - Pop-Up Rotary Activation System
Canonical parent code/title	M-T1-CP-14 - Pop-Up Rotary Activation System
Canonical parent code and title	M-T1-CP-14 - Pop-Up Rotary Activation System
Named overlay or migration label	Scoped Information and Referral Desk
Redirect or tombstone route	Permanent overlay alias from M-T1-CP-16 - Rotary Community Help Desk to M-T1-CP-14 - Pop-Up Rotary Activation System; retain stable derivative code M-T1-CP-16-SD-01.
Supporting-document migration control	Retain both CP-16 codes only with service-boundary script, privacy controls and approved referral route.
Family master	Playbook_F01_Event_and_Activation_Planning_Master.md

Controlled field	Configured entry
Family master file	Playbook_F01_Event_and_Activation_Planning_Master.md
Derivative version	0.1 REVIEW
Prepared date	2 August 2026
Adaptation note	The complete F01 operating controls are configured below for Rotary Community Help Desk. The mandatory Scoped Information and Referral Desk requirements are embedded as auditable tasks, risks, resources and measures rather than left as a pointer to the family master.

2. Instructions for the review copy

1. Replace every blank with an event-specific fact, owner, date, threshold or evidence location.
2. Keep the exact code, title, source initiative, disposition, canonical parent and overlay metadata unchanged.
3. For a control that genuinely does not apply, enter Not applicable, the reason, the decision owner and the acceptance date. Do not delete the control.
4. Confirm local requirements with the venue, landowner, organiser, insurer, council, safeguarding lead and other competent authorities relevant to the actual activity.
5. Do not promote, spend, contract or open to the public until the go gate and pre-event approvals are complete.
6. Retain the approved working copy, permissions, financial record, incidents, follow-up record and debrief under the approved records policy.
7. This planning tool is not legal, medical, engineering, food-safety or insurance advice. Australian requirements vary by jurisdiction, site and activity.

Checklist key: [] open; [x] complete and evidenced; N/A accepted with reason and owner.

3. Working document control

Operational field	Entry
Event or activation name	_____
Club or delivery unit	_____
Event lead	_____
Accountable sponsor	_____
Safety and safeguarding lead	_____
Privacy and registration lead	_____
Version	0.1 REVIEW / update before approval
Prepared by and date	_____
Review meeting date	_____
Approved date	Not approved
Next review date	_____
Working-file location	_____
Approved budget record	_____
Final event record location	_____

Change record

Version	Date	Change	Author	Approver
0.1 REVIEW	2 August 2026	First configured derivative for substantive review	Codex working team	Pending
_____	_____	_____	_____	_____

4. Configured operating profile

Planning choice	Configured starting point to confirm
Format	Scoped information and referral desk with a published service boundary, current authorised directory, observable privacy arrangement and minimum-data follow-up
Recommended lead time	8-12 weeks for directory and referral validation; 2-4 weeks for each deployment review
Planned duration	Approved staffed operating window with two-person coverage where the risk profile requires it
Primary purpose	Help people reach approved local information or specialist services while keeping Rotary hosts within competence and collecting only minimum necessary detail.
Primary audience	Community members seeking local information, a connection or an approved referral
Secondary audience	Host-site staff and partner organisations receiving agreed referrals
Partner or stakeholder audience	Host site, authorised referral organisations, safeguarding lead and privacy owner
Primary participant next step	Receive an approved information route or consent to a specific, owned referral follow-up
Primary audience promise	Ask for local information and, where appropriate, receive a safe route to an authorised service.
Critical approval focus	Host agreement on desk scope, current referral directory, service-boundary script, sensitive-enquiry privacy and urgent escalation routes
Critical risk focus	A host gives personal, legal, medical, financial or crisis advice beyond competence or records unnecessary sensitive detail
Key configured resource set	Published scope statement; service-boundary script; current referral directory; urgent escalation card; private-but-observable discussion point; secure minimum-data contact record
Related controlled interfaces	M-T1-CP-16-SD-02 Community Contact Sheet; authorised F03 financial record where expenditure applies

Related interfaces are inputs or records, not substitutes for the controls in this derivative.

5. Mandatory configured adaptation checklist

Every row below is mandatory for this exact code. Record an owner, due date and evidence before approval.

Mandatory configured requirement	Done	Owner and due date	Evidence or accepted decision
Agree the help desk's scope with the host site and publish what the team can and cannot assist with.	[]	_____	_____
Maintain a current referral directory and require hosts to avoid personal, legal, medical, financial or crisis advice beyond their competence.	[]	_____	_____
Provide a private but observable way to discuss sensitive concerns without collecting unnecessary detail.	[]	_____	_____
Use two-person coverage where the setting, safeguarding profile or sensitive enquiries make it prudent.	[]	_____	_____

Mandatory configured requirement	Done	Owner and due date	Evidence or accepted decision
Brief urgent danger, safeguarding, homelessness, family violence, mental-health and other specialist referral routes using authorised local information.	[]	_____	_____
Record only the minimum contact and referral detail required for an agreed follow-up.	[]	_____	_____

6. Event decision brief

Decision	Configured record
Community need or opportunity	Help people reach approved local information or specialist services while keeping Rotary hosts within competence and collecting only minimum necessary detail. Confirm the local evidence or partner request: _____
Why Rotary is a credible contributor or convener	Current local service, trusted relationships and members able to connect people to the stated next step. Local evidence: _____
Primary purpose category	Listening / Referral / Community connection
Desired change for participants	Participants understand the offer, have a useful interaction and can act on the configured next step: Receive an approved information route or consent to a specific, owned referral follow-up.
Desired change for community or partner	The activity creates verified engagement and owned follow-through, not visibility alone.
Why this format is appropriate	Confirm why scoped information and referral desk with a published service boundary, current authorised directory, observable privacy arrangement and minimum-data follow-up is more useful than a meeting, email or existing initiative: _____
Decision if the event does not proceed	Cancel / Defer / Merge / Use a lower-risk format

Outcomes and thresholds

Outcome	Evidence or measure	Target or decision threshold	Owner
Relevant people engage meaningfully	Enquiries resolved within the published desk scope	_____	_____
Participants accept an appropriate next step	Approved referrals accepted with minimum necessary data	_____	_____
Rotary fulfils its promises and closes controls	Promised follow-ups completed and sensitive records closed correctly	_____	_____

Explicit non-goals

- Maximising raw foot traffic, names collected or publicity without useful engagement.
- Giving advice, making claims or collecting personal information beyond the approved scope.

Scope boundary

In scope	Out of scope
Planned delivery of the configured format inside the approved site, time and operating conditions	Unapproved activity, structures, trading, collection, advice or data use
Current, verified stories and respectful two-way engagement	Outdated claims, generic membership pressure or unsupported partner claims
Consent-based next steps with named owners and due dates	Adding people to future communications without a clear affirmative choice

7. Audience journey and experience

Journey stage	Required configured experience	Owner	Evidence or test
Discover	One clear promise: Ask for local information and, where appropriate, receive a safe route to an authorised service.	_____	Five-second comprehension test
Decide	Date, time, place, duration, cost, access and participation conditions are complete	_____	Independent invitation check
Arrive or register	Low-friction welcome with paper or assisted fallback	_____	Arrival walkthrough
Orient	Purpose, boundaries, amenities, safety and help contact are clear in the first five minutes	_____	Host rehearsal
Participate	Interaction is useful, inclusive and within the approved scope	_____	Observation plan
Choose a next step	Receive an approved information route or consent to a specific, owned referral follow-up	_____	Tested action route
Follow up	Promised action is consent-based, owned, dated and recorded	_____	Follow-up queue

- ☐ Community value is explained before internal Rotary structure.
- ☐ A first-time visitor can understand the offer without Rotary knowledge.
- ☐ Hosts initiate respectful conversation and accept disengagement immediately.
- ☐ Public claims are current, specific, evidenced and authorised.
- ☐ Access to the activity does not depend on consenting to future contact.
- ☐ Complaints, accessibility requests and safeguarding concerns have a named route.

8. Go / modify / stop gate

Gate question	Yes	No	N/A	Evidence or action
Purpose and expected community value justify the resources.	☐	☐	☐	_____
Event lead and one accountable sponsor are confirmed.	☐	☐	☐	_____
Host agreement on desk scope, current referral directory, service-boundary script, sensitive-enquiry privacy and urgent escalation routes.	☐	☐	☐	_____
Insurance applicability, exclusions and evidence requirements are confirmed.	☐	☐	☐	_____
A host gives personal, legal, medical, financial or crisis advice beyond competence or records unnecessary sensitive detail is controlled to an accepted level.	☐	☐	☐	_____
Accessibility barriers are addressed or clearly communicated.	☐	☐	☐	_____
Safeguarding controls are confirmed for the expected audience and activity.	☐	☐	☐	_____
Food, alcohol, gas, electrical, traffic, structure and public-land triggers are resolved.	☐	☐	☐	_____
Budget and spending authority are approved.	☐	☐	☐	_____
Brand, image rights, privacy and data controls are ready.	☐	☐	☐	_____
The team can fulfil every promised follow-up by its due date.	☐	☐	☐	_____

Decision: Go / Modify / Defer / Stop **Decision owner and date:** _____ **Conditions:** _____

9. Approvals and external requirements

Approval or confirmation	Configured trigger	Owner	Authority or source	Evidence location	Due	Status
Club or committee approval	All delivery		Club governance			Open
Site, venue, landowner or organiser consent	Any use of a site or host event		Current written site authority			Open
Variant-specific operating approval	Host agreement on desk scope, current referral directory, service-boundary script, sensitive-enquiry privacy and urgent escalation routes		Relevant competent authority			Open
Council or land-manager requirements	Public land, structures, trading, signs, noise or changed access		Relevant authority			Open / N/A
Insurance confirmation	Public activity, volunteers, equipment, suppliers or exhibitors		Authorised insurance contact			Open
Food requirements	Not applicable unless refreshments are separately approved; record the accepted N/A decision.		Venue, organiser and relevant authority			Open / N/A
Safeguarding	MANDATORY for sensitive enquiries: use observable accountable practice, authorised escalation and two-person coverage where prudent.		Club or district safeguarding lead			Open / N/A
Traffic, pedestrian, structure, gas and electrical controls	When triggered by site or equipment		Site or competent provider			Open / N/A
Brand artwork approval	All new public-facing Rotary or district artwork		Authorised brand reviewer			Open
Photography and story permissions	Identifiable people, personal stories or partner material		Rights and consent owner			Open / N/A
Data and privacy review	Registration, enquiry, referral or follow-up data		Privacy or data owner			Open / N/A

10. Delivery timeline

Timing	Minimum configured output	Owner	Done
8-12 weeks for directory and referral validation; 2-4 weeks for each deployment review before	Purpose, sponsor, site path, budget range, audience and partners		[]
8-6 weeks before or proportionate equivalent	Site terms, insurance, approval path, safeguarding and access review		[]
6-4 weeks before	Program, suppliers, designs, data flow and configured resources		[]
4-2 weeks before	Promotion, roster, run sheet, accessibility information and bookings		[]

Timing	Minimum configured output	Owner	Done
14-7 days before	Final site review, risks, proofs, tested action routes and briefing pack	_____	[]
72 hours before	Weather, attendance, supplier, contact and contingency decision	_____	[]
24 hours before	Pack, charge, print, test, confirm handovers and publish changes	_____	[]
Delivery day	Brief, inspect, deliver, monitor, record, close and hand back	_____	[]
Within 24 hours	Incident closure, urgent promises, thanks and asset check	_____	[]
Within 2 business days	Consent-based follow-up, referrals and partner response	_____	[]
Within 5 business days	Finance close, measures, debrief and records filing	_____	[]
Within 14 days	Improvement and repeat, modify or stop decision	_____	[]

11. Responsibility and contacts

Workstream	Accountable	Responsible	Consulted	Informed	Event-day contact
Overall delivery and stop decision	_____	_____	_____	_____	_____
Program and participant experience	_____	_____	_____	_____	_____
Site, equipment and configured resources	_____	_____	_____	_____	_____
Safety, first aid and incidents	_____	_____	_____	_____	_____
Safeguarding and accessibility	_____	_____	_____	_____	_____
Volunteers, partners or contributors	_____	_____	_____	_____	_____
Communications, brand and permissions	_____	_____	_____	_____	_____
Registration, privacy and follow-up	_____	_____	_____	_____	_____
Finance, procurement and close-out	_____	_____	_____	_____	_____

Critical contact	Name or organisation	Primary contact	Backup
Venue, site or organiser	_____	_____	_____
Emergency services	Immediate danger in Australia	000	_____
First aider	_____	_____	_____
Safeguarding escalation	_____	_____	_____

Critical contact	Name or organisation	Primary contact	Backup
Supplier or technical lead	_____	_____	_____
Club or district escalation	_____	_____	_____

12. Site, access and inclusion review

Site fact	Confirmed record
Address and approved operating area	_____
Site manager and event-day contact	_____
Bump-in, opening, closing, bump-out and handback times	_____
Loading, storage, power, water and internet	_____
Public transport, parking and accessible drop-off	_____
Toilets, handwashing, seating and rest options	_____
First-aid point, emergency access and assembly point	_____
Weather shelter or approved alternate	_____

- ☐ Step-free route is confirmed or limitations are communicated before attendance.
- ☐ Aisles, queue points and activity spaces preserve safe and accessible movement.
- ☐ Accessible parking, transport, toilet and seating information is published where available.
- ☐ Lighting, glare, noise and sensory load are reviewed.
- ☐ Print and digital information use readable type, contrast and plain language.
- ☐ Captions, hearing support, interpreter or assisted participation needs are considered.
- ☐ Assistance animals and individual access requests have a named contact.
- ☐ Emergency arrangements include people who may need assistance.

Access limitations, mitigation and acceptance: _____

13. Safety, insurance, food and safeguarding

Hazard or scenario	Who may be affected	Controls before opening	Monitor	Stop or escalate trigger
A host gives personal, legal, medical, financial or crisis advice beyond competence or records unnecessary sensitive detail	Participants, team and public	_____	_____	An urgent danger or specialist need arises, the referral directory is unverified, or privacy and two-person safeguards cannot be maintained
Slips, trips, loading and manual handling	_____	_____	_____	Unsafe route or task
Weather, heat, UV, wind or rain	_____	_____	_____	Pre-agreed threshold reached
Electrical, gas, power or equipment failure	_____	_____	_____	Isolation or safe fallback unavailable
Vehicle, pedestrian, crowd or queue interaction	_____	_____	_____	Safe separation cannot be maintained

Hazard or scenario	Who may be affected	Controls before opening	Monitor	Stop or escalate trigger
Medical event, conflict or unsafe conduct	_____	_____	_____	Beyond volunteer competence or immediate danger
Child or vulnerable-person concern	_____	_____	_____	Safeguarding path activated
Food, allergen, hygiene or waste issue	_____	_____	_____	Service control fails
Data, device or paper-record loss	_____	_____	_____	Loss or unauthorised access suspected
Activity-specific hazard	_____	_____	_____	_____

- ☐ Activity and material facts were accurately described to the authorised insurance contact.
- ☐ Cover, exclusions, participant conditions and evidence requirements were confirmed.
- ☐ Required supplier, contractor or exhibitor evidence is retained.
- ☐ Incident notification and record-retention instructions are available.
- ☐ Food-control treatment: Not applicable unless refreshments are separately approved; record the accepted N/A decision.
- ☐ Safeguarding treatment: MANDATORY for sensitive enquiries: use observable accountable practice, authorised escalation and two-person coverage where prudent.
- ☐ Emergency, incident, concern and lost-person processes are briefed.
- ☐ Stop authority is accepted by the event lead, safety or safeguarding lead, site representative and competent technical lead.

Evidence locations and stop-authority names: _____

14. Program and run sheet

Relative time	Clock time	Configured activity	Participant experience or message	Lead	Equipment or cue	Fallback
Opening -120 min	_____	Site access and condition check	Approved, safe and accessible operating area	_____	Site record	Escalate before unloading
Opening -90 min	_____	Setup: Published scope statement; service-boundary script; current referral directory; urgent escalation card; private-but-observable discussion point; secure minimum-data contact record	Unsafe setup area remains separated from public	_____	Pack list	Reduced safe configuration
Opening -45 min	_____	Test access, information, data and equipment	Every public touchpoint works	_____	Test script	Paper or non-powered mode
Opening -30 min	_____	Team safety, scope, access and safeguarding brief	Team understands boundaries and escalation	_____	Briefing card	Delay if critical role absent
Opening	_____	Welcome and configured delivery begins	Ask for local information and, where appropriate, receive a safe route to an authorised service.	_____	Opening cue	Short-form opening
Main activity	_____	Scoped information and referral desk with a published service boundary, current authorised directory, observable privacy arrangement and minimum-data follow-up	Respectful engagement and relevant next step	_____	Configured materials	Simplify without weakening controls
Midpoint	_____	Welfare, stock, queue and quality reset	Consistent, accessible experience	_____	Reset list	Rotate team or reduce scope

Relative time	Clock time	Configured activity	Participant experience or message	Lead	Equipment or cue	Fallback
Close -15 min	_____	Final next-step invitation	Receive an approved information route or consent to a specific, owned referral follow-up	_____	Follow-up route	Assisted response
Close	_____	Thank participants and explain follow-up	No unowned promise	_____	Closing cue	Direct contact card
Close +15 min	_____	Secure data, cash and sensitive material	Records protected before pack-down	_____	Secure container	Direct transfer to owner
Close +60 min	_____	Asset check, site handback and hot debrief	Safe close and accepted handback	_____	Handover record	Remain until issue assigned

15. Resources, procurement and finance

Resource	Quantity	Source	Owner	Ready date	Transport or storage	Return or disposal
Published scope statement; service-boundary script; current referral directory; urgent escalation card; private-but-observable discussion point; secure minimum-data contact record	_____	_____	_____	_____	_____	_____
Approved signs and current project material	_____	_____	_____	_____	_____	_____
Registration, privacy and paper fallback material	_____	_____	_____	_____	_____	_____
Accessibility, seating or assisted-participation aids	_____	_____	_____	_____	_____	_____
Safety, first-aid and weather equipment	_____	_____	_____	_____	_____	_____
Cleaning, waste and asset-return supplies	_____	_____	_____	_____	_____	_____

- ☐ Commitments remain within delegated authority.
- ☐ Supplier scope, price, cancellation, delivery, safety and insurance evidence are recorded.
- ☐ Conflicts of interest are declared and managed.
- ☐ Borrowed, donated and in-kind resources are recorded.
- ☐ Asset condition is checked before issue and after return.
- ☐ Waste, recycling and disposal are agreed with the site.

Use M-T1-CP-01-SD-03 Event Budget Template as the Fo3 family financial record unless the controlled index issues a replacement. Do not maintain competing totals here.

Financial control	Record
Approved budget link or file	_____
Finance owner and spending authority	_____
Maximum commitment and contingency authority	_____
Income, donation, sponsorship or cashless handling	_____
Supplier payment and receipt route	_____
Reconciliation due date	_____

16. Brand, imagery, registration and privacy

- ☐ Current authorised Rotary and District assets are used.
- ☐ Logos are not redrawn, stretched, recoloured, rearranged or generated by an image model.
- ☐ Clear space, legibility, viewing distance and final-size proof are checked.
- ☐ Claims, partner logos, results, captions and stories are accurate and authorised.
- ☐ Identifiable people, children, partners and creators have the required permissions.
- ☐ A practical no-photo method is available and briefed.
- ☐ AI-generated imagery contains no simulated Rotary marks, branded uniforms, certificates or event signage.

Data element	Operational need	Access owner	Retention or deletion rule	Secure location
Name	_____	_____	_____	_____
Contact method	_____	_____	_____	_____
Attendance, enquiry or role	_____	_____	_____	_____
Access or dietary information	_____	_____	_____	_____
Future-contact preference	Separate affirmative choice only	_____	_____	_____
Other essential data	_____	_____	_____	_____

- ☐ The form states what is collected, why, who uses it and how to ask a question.
- ☐ Only necessary data is collected and access is limited.
- ☐ Paper forms, exports and devices have named custodians.
- ☐ Loss or unauthorised access follows the approved escalation process.
- ☐ Correction, retention and disposal follow the approved policy and applicable obligations.

17. Communications plan

Primary audience promise: Ask for local information and, where appropriate, receive a safe route to an authorised service. **One-sentence description:** Help people reach approved local information or specialist services while keeping Rotary hosts within competence and collecting only minimum necessary detail. **Primary call to action:** Receive an approved information route or consent to a specific, owned referral follow-up **Accessibility contact:** _____ **Authorised media contact:** _____

Audience	Channel or asset	Purpose	Owner	Release date	Approval	Measure
Intended participants	_____	Invite and inform	_____	_____	_____	_____
Members and volunteers	_____	Recruit and brief	_____	_____	_____	_____

Audience	Channel or asset	Purpose	Owner	Release date	Approval	Measure
Partners or contributors	_____	Confirm duties and boundaries	_____	_____	_____	_____
Site, organiser or authorities	_____	Confirm operations and compliance	_____	_____	_____	_____
Registered or interested people	_____	Confirm access, timing and changes	_____	_____	_____	_____
Post-event audience	_____	Thank, report and offer the agreed next step	_____	_____	_____	_____

- ☐ Date, location, duration, cost, deadline and response route are unambiguous.
- ☐ Access, transport, weather, clothing, safety and participation conditions are stated.
- ☐ Copy is understandable without Rotary acronyms or internal knowledge.
- ☐ One call to action is visually dominant.
- ☐ Contact, registration, QR and fallback routes are independently tested.
- ☐ Correction, cancellation and urgent-update messages are ready.

18. Contingencies and decision triggers

Scenario	Pre-agreed trigger	Response	Decision owner	Communication route
Variant-critical failure	An urgent danger or specialist need arises, the referral directory is unverified, or privacy and two-person safeguards cannot be maintained	Modify, pause, relocate or stop; do not improvise outside approval	_____	_____
Severe weather or unsafe site	_____	Move, modify, delay or cancel under official and site advice	_____	_____
Critical team absence	_____	Use reduced safe format or defer	_____	_____
Low or excessive attendance	_____	Adjust scale, meter access or use approved overflow	_____	_____
Power, internet or equipment failure	_____	Use tested paper or non-powered fallback	_____	_____
Medical, safety or safeguarding incident	_____	Stop affected activity; use trained response; call 000 for immediate danger	_____	_____
Food or allergen concern	_____	Stop service, isolate affected items and use authorised response	_____	_____
Data, form or device loss	_____	Secure access, preserve facts and escalate	_____	_____
Aggressive or unsafe conduct	_____	Use site security or emergency response	_____	_____
Venue, speaker, supplier or partner unavailable	_____	Use approved alternate, revise scope or cancel	_____	_____

19. Team briefing and opening authorisation

Every event-day team member must be able to state:

- the purpose, audience promise and one primary next step;
- who is accountable and who may stop an unsafe activity;
- first aid, emergency access, assembly and incident-record locations;
- safeguarding conduct, scope boundaries and escalation routes;
- accessibility support and known limitations;
- approved data, image, story and public-claim boundaries;
- weather, attendance and equipment triggers;
- owners for pack-down, data transfer, handback and follow-up.

Brief lead, time and attendance record: _____

- ☐ Written site, organiser and authority confirmations are accessible.
- ☐ Site condition, emergency access, equipment and barriers are acceptable.
- ☐ Access routes, seating, toilets and communication support are ready.
- ☐ Food, gas, electrical and activity-specific controls are complete where relevant.
- ☐ Team is present, briefed, identifiable and rostered for breaks.
- ☐ Registration, consent, payment and privacy processes are tested.
- ☐ Brand, facts, links, captions and calls to action are checked.
- ☐ Photography and no-photo processes are briefed.
- ☐ Weather, capacity, variant risk and stop thresholds remain acceptable.
- ☐ Contingency materials and fallback mode are available.

Opening authorised by, time and conditions: _____

20. Follow-up and close-out

Person or organisation	Consent and context	Promised action	Owner	Due	Done	Record location
_____	_____	_____	_____	_____	☐	_____
_____	_____	_____	_____	_____	☐	_____
_____	_____	_____	_____	_____	☐	_____

- ☐ Safety, safeguarding, food, property and privacy concerns are escalated and recorded.
- ☐ Site handback is accepted and damage or defects are documented.
- ☐ Participant and partner promises have named owners and due dates.
- ☐ Thank-you and confirmation messages use consented channels.
- ☐ Enquiries go to an appropriate next step, not a generic mailing list by default.
- ☐ Paper forms, devices, cash and sensitive material are transferred securely.
- ☐ Equipment is counted, cleaned, returned and loss or damage recorded.
- ☐ Invoices, receipts, income and in-kind support are reconciled.
- ☐ Approved images and captions remain paired with permission evidence.
- ☐ Public recap uses verified figures and authorised imagery.
- ☐ Measures and lessons are reviewed before announcing a repeat.

21. Measures, decision and learning

Dimension	Configured measure	Target	Actual	Evidence	Interpretation
Reach	Relevant participants or meaningful passers-by	_____	_____	_____	_____
Engagement	Enquiries resolved within the published desk scope	_____	_____	_____	_____
Conversion	Approved referrals accepted with minimum necessary data	_____	_____	_____	_____
Follow-through	Promised follow-ups completed and sensitive records closed correctly	_____	_____	_____	_____
Inclusion	Access needs met and barriers reported	_____	_____	_____	_____
Safety	Incidents, near misses and control failures	0 unresolved	_____	_____	_____
Team health	Filled roles, breaks and volunteer feedback	_____	_____	_____	_____
Financial	Net cost and material variance	_____	_____	F03 record	_____
Reputation	Verified feedback, media or complaints	_____	_____	_____	_____

Outcome decision and reason: Repeat unchanged / Repeat with modification / Scale / Merge / Stop

Review prompt	Evidence-based lesson	Controlled change proposed	Owner	Due
What created the most community value?	_____	_____	_____	_____
Where did the participant journey fail or slow?	_____	_____	_____	_____
Which safety, access or safeguarding control needs improvement?	_____	_____	_____	_____
Which message, interaction and next step worked best?	_____	_____	_____	_____
Which promise, cost or resource assumption was difficult?	_____	_____	_____	_____

22. Sign-off and review-release gate

Pre-event approval

Role	Name	Decision	Date	Recorded approval location
Event lead	_____	Ready / Ready with conditions / Not ready	_____	_____
Safety and safeguarding lead	_____	Ready / Ready with conditions / Not ready	_____	_____
Finance or delegated approver	_____	Approved / Not approved	_____	_____
Accountable sponsor	_____	Go / Modify / Defer / Stop	_____	_____

Post-event closure

Role	Name	Closure statement	Date	Record location
Event lead	_____	Delivery and site records complete	_____	_____
Safety and safeguarding lead	_____	Incidents and concerns closed or transferred	_____	_____

Role	Name	Closure statement	Date	Record location
Privacy and registration lead	_____	Data secured and follow-up assigned	_____	_____
Finance owner	_____	Reconciliation complete or exceptions assigned	_____	_____
Accountable sponsor	_____	Lessons and next-event decision accepted	_____	_____

Derivative review and release checklist

- ☐ Exact code, title, source initiative, disposition, canonical parent and overlay match index v1.1.
- ☐ Every mandatory adaptation row in Section 5 is completed and evidenced.
- ☐ No unused control was deleted; every N/A has a reason, owner and acceptance date.
- ☐ Event facts, owners, dates, thresholds and evidence locations are complete.
- ☐ Event, safety or safeguarding, finance and sponsor reviews are recorded.
- ☐ Local-condition decisions cite an official or competent source without claiming universal legal requirements.
- ☐ Current brand, rights, accessibility, privacy and data controls are verified.
- ☐ Related controlled interfaces resolve and carry matching event facts.
- ☐ Editable and accessible copies carry matching identity and version information.
- ☐ Final distribution copy is rendered and visually reviewed page by page.
- ☐ Release row, checksum, approval and evidence are complete before status changes from REVIEW.

Review decision: Accept for local completion / Return for revision / Reject **Reviewer, date and comments:**
