



F07 CONFIGURED SUPPORTING DOCUMENT

Forum Facilitation Guide

A controlled, editable working derivative for M-T1-CP-20-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.

F07 configured review derivative

Status: REVIEW - configured working derivative; not approved for participant use or delivery **Theme:** Attraction and Visibility
Sub-theme: Community Presence and Visibility

1. Controlled identity and migration metadata

Controlled field	Configured entry
Status	REVIEW - local facts, owners, rehearsals, approvals and release evidence remain required
Supporting-document code	M-T1-CP-20-SD-01
Exact derivative title	Forum Facilitation Guide
Source initiative	M-T1-CP-20 - Community Leadership Forum
Source initiative code	M-T1-CP-20
Source initiative title	Community Leadership Forum
Source initiative code/title	M-T1-CP-20 - Community Leadership Forum
Initiative disposition	Retired from CP portfolio
Canonical parent	M-T1-CL-01 - Civic Leadership Dialogues
Canonical parent code/title	M-T1-CL-01 - Civic Leadership Dialogues
Canonical parent code and title	M-T1-CL-01 - Civic Leadership Dialogues
Named overlay or migration label	CP-20 transitional redirect
Redirect or tombstone route	Permanent redirect and tombstone from M-T1-CP-20 - Community Leadership Forum to M-T1-CL-01 - Civic Leadership Dialogues; retain stable derivative code M-T1-CP-20-SD-01 until the verified replacement route is released.
Supporting-document migration control	Keep both CP-20 codes resolvable through the alias release; migrate or regenerate under verified M-T1-CL-01 before removing CP navigation; retain a permanent redirect and tombstone.
Family master	Playbook_F07_Facilitation_Agenda_Script_Master.md
Family / master version	F07 - Facilitation, Agenda and Script / 1.0
Recorded master SHA-256	26bb2a75bd3d0fa1c5e4d952df55b994c94a7d09c569cf62b9b87518efbf5b92
Authoritative index	Playbook_Supporting_Documents_Master_Index.md v1.1, issued 2 August 2026
Configured master variant	M-T1-CP-20-SD-01 — Forum Facilitation Guide; F07 exact code/title overlay incorporated in full
Derivative version	0.1 REVIEW
Prepared date	2 August 2026

Controlled field	Configured entry
Adaptation note	The complete F07 facilitation workflow is configured for Community Leadership Forum and the CP-20 transitional redirect route. Purpose, audience, scope, authority, question design, scripts, capture, safeguarding, handoffs, follow-up and evaluation are embedded below; local delivery facts remain controlled review fields.

2. Instructions and control rule

1. Complete every local blank from an approved initiative brief, venue and access record, participant plan, safeguarding plan, roster or named owner.
2. Keep the exact code, derivative title, source initiative, disposition, canonical parent and migration route unchanged.
3. Mark a control Not applicable only with a reason, accepting owner and date; never silently delete a safety, access, privacy or authority control.
4. Read every public script aloud, test all contribution routes and rehearse the difficult-conversation, safeguarding and emergency handoffs.
5. Do not infer decision authority, confidentiality, access provision, participant need, recording permission, safeguarding route or follow-up promise.
6. Promotion and delivery remain blocked until the preparation gate, role acceptance and final review gate are complete.
7. This is operational facilitation guidance, not clinical, legal, investigative, security or safeguarding advice. Use authorised roles and current local procedures.

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

3. Controlled session fields

Field	Configured value or completion record
Session or activation name	_____
Host entity	_____
Format	Moderated 90-minute civic leadership forum with equal-time contributor perspectives, approved public questions and neutral synthesis
Public duration	90 minutes
Session purpose	Convene government, business and community leaders for constructive dialogue on a scoped local issue under the Civic Leadership Dialogues architecture.
Defined audience	Invited leaders, subject-matter contributors and approved observers or public participants.
Observable desired outcome	A neutral record distinguishes perspectives, verified evidence, disagreement, evidence gaps, options and owned next steps without manufacturing consensus.
In scope	The approved civic issue, relevant evidence, differing perspectives, practical options and the authority for any next dialogue
Out of scope	Rotary endorsement of a speaker or position, partisan campaigning, personal attack, fabricated consensus or decisions outside the approved forum authority
Decision authority	The forum convenes dialogue and records outputs; only the named authorised body may make a decision, recommendation or commitment.
Approved capacity	Approved venue and moderation capacity with equivalent contributor access and a controlled participant-question route
Date, start, finish and time zone	_____
Venue, room or online access route	_____
Arrival or check-in instruction	_____

Field	Configured value or completion record
Lead facilitator	_____
Co-facilitator or inclusion monitor	_____
Timekeeper	_____
Scribe or capture owner	_____
Welcome lead	_____
Digital producer, if used	_____ / N/A with reason
Follow-up owner	_____
Safeguarding lead	_____
Alternate safeguarding route	_____
Safety lead and disruption exit authority	_____
Emergency route	_____
Accessibility contact	_____
Confirmed access provisions	_____
Participation options	Speak, write, pass, pause and use an assisted equivalent; confirm any additional mode: _____
Communication supports	_____
Break, quiet-space and re-entry route	_____
Conduct agreement	Challenge ideas without attacking people; one person at a time; passing is permitted; approved local wording: _____
Privacy and capture boundary	Neutral perspectives, evidence, disagreement, options and owned actions; no false consensus or implied endorsement. Confirm attribution, access, retention and disposal: _____
Recording or photography notice	None unless separately approved; approved treatment: _____
Opening context source	_____
Prioritisation method	_____ / N/A
Primary next step	Publish or circulate the approved neutral summary and transfer each owned action to M-T1-CL-01 Civic Leadership Dialogues.
Next-step owner and due date	_____
Participant follow-up date and route	_____
Evaluation route and alternative	_____
Working-copy owner and location	_____

4. Exact configured master overlay

Purpose: Convene leaders from government, business and community organisations for constructive dialogue on a scoped local issue.

Audience: Invited leaders, subject-matter contributors and approved observers or public participants.

Recommended 90-minute forum flow:

- Welcome, neutrality, purpose, scope, authority, conduct and access — 8 minutes
- Verified context from the approved briefing — 7 minutes
- Contributor perspectives under equal time rules — 24 minutes
- Facilitated cross-questioning — 20 minutes
- Participant questions through the approved moderation route — 15 minutes
- Synthesis: agreement, disagreement, evidence gaps and options — 8 minutes
- Next-step ownership and close — 8 minutes

Moderator controls:

- disclose the selection and question method;
- give equivalent time and comparable prompts;
- distinguish evidence, experience and opinion;
- reject personal attack without suppressing challenge;
- do not imply Rotary endorsement of a speaker or position;
- use the hostile/disruptive behaviour protocol consistently; and
- close on time with an accurate account of authority.

Output: A neutral summary of perspectives, evidence gaps, options and owned next steps. Do not manufacture consensus.

5. Roles and responsibility

Role	Before	During	After	Accepted by
Session owner	Approve purpose, scope, authority and follow-up	Resolve governance boundaries	Accept actions and escalations	_____
Lead facilitator	Design and rehearse flow and scripts	Guide participation and protect time	Validate outputs and debrief	_____
Inclusion monitor	Review access and participation methods	Watch airtime, access, distress and alternatives	Record barriers and improvements	_____
Timekeeper	Confirm timeboxes and warning cues	Protect synthesis and close	Record timing variance	_____
Scribe	Approve capture categories and privacy boundary	Label themes, questions, decisions and actions	Secure and validate notes	_____
Welcome lead	Confirm arrival and orientation	Route practical and access questions privately	Hand off attendance changes	_____
Safeguarding lead	Confirm primary, alternate and restricted-record routes	Receive concerns under approved procedure	Own restricted follow-through	_____
Safety lead	Confirm venue and conduct response	Apply graduated response or emergency route	Record factual incidents	_____
Follow-up owner	Prepare messages and tracking	Record only promised consented actions	Complete and close follow-up	_____

Role	Before	During	After	Accepted by
Variant-specific operational role	Equal-time contributions, comparable prompts, moderated cross-questioning, approved participant questions and neutral synthesis	Apply the configured method and boundary	Transfer neutral perspectives, evidence, disagreement, options and owned actions; no false consensus or implied endorsement	

No one may expand scope, promise an outcome, diagnose a participant, attribute comments against the approved method or add people to unrelated promotion.

6. Preparation and go gate

Gate	Ready condition	Evidence location	Owner	Ready
Purpose and audience	One plain-language purpose and defined audience are approved		Session owner	[]
Scope and authority	In-scope, out-of-scope and authority statements prevent implied promises		Initiative lead	[]
Participant information	Timing, venue, access, privacy, recording and practical facts arrive early enough		Communications owner	[]
Roles	Operational, backup and escalation roles accept their duties		Session owner	[]
Access	Confirmed provisions and genuine alternative participation can be delivered		Access reviewer	[]
Safeguarding	Primary, alternate, emergency and restricted-record routes are current		Safeguarding lead	[]
Safety and disruption	Venue controls, exit authority and graduated response are usable		Safety lead	[]
Questions	Selected prompts are neutral, scoped and non-compulsory		Lead facilitator	[]
Capture	Categories, privacy, access, storage and disposal are approved		Scribe/privacy owner	[]
Handoffs	Access, complaint, media, partnership, volunteer and technical routes are assigned		Follow-up owner	[]
Evaluation	Brief accessible participant and team routes are tested		Evaluation owner	[]
Rehearsal	Opening, transitions, time cues, hard moments and close sound natural		Lead facilitator	[]
Variant control	Equal-time contributions, comparable prompts, moderated cross-questioning, approved participant questions and neutral synthesis is tested in the real delivery context		Session owner	[]

Gate decision: Ready / Ready with conditions / Not ready **Decision owner, date and conditions:**

7. Configured agenda and run sheet

Relative time	Clock time	Segment	Facilitator action	Participant choice or task	Output	Flex decision
Before start -30 min		Site, platform, role and access check	Test emergency, safeguarding, capture, materials and alternatives	Not applicable	Readiness confirmed	Do not open if a critical route is absent
Before start -10 min		Arrival and orientation	Welcome, give practical information and route access questions privately	Arrive, pause or request support	Participants oriented	Delay formal opening if access fails

Relative time	Clock time	Segment	Facilitator action	Participant choice or task	Output	Flex decision
Start	_____	Purpose, scope and authority	Deliver the configured opening script below	Listen, read or ask a clarification	Shared boundary	Keep even when time is lost
+5 min	_____	Participation, privacy and conduct	Explain passing, contribution choices, capture and support	Choose a contribution method	Informed participation	Keep even in compact format
Core	_____	Equal-time contributions, comparable prompts, moderated cross-questioning, approved participant questions and neutral synthesis	Use only approved prompts and reflect points neutrally	Speak, write, pass or use an equivalent route	Neutral perspectives, evidence, disagreement, options and owned actions; no false consensus or implied endorsement	Reduce question count, not safeguards
Synthesis	_____	Validate output categories	Distinguish themes, questions, options, recommendations, decisions and actions	Correct, add or disagree	Accurate validated record	Record dissent; do not force consensus
Action	_____	Next steps and parking lot	Confirm authority, owners, dates and disposition routes	Choose only consented follow-up	Owned action record	Never imply every item will proceed
Close	_____	Summary, follow-up and evaluation	Deliver configured close below	Evaluate or leave without further contact	Clear next step	Protect the close from overrun
After	_____	Secure records and debrief	Separate general notes from restricted records	Not applicable	Handoffs accepted	Escalate urgent matters immediately

Configured timing note: 90 minutes. Apply the exact timing supplied in Section 4 and record any approved deviation:

8. Opening and closing scripts

Configured opening

Welcome to **[SESSION OR ACTIVATION NAME]**. I am **[LEAD FACILITATOR]**, and **[HOST ENTITY]** has invited invited leaders, subject-matter contributors and approved observers or public participants. for one clear purpose: Convene government, business and community leaders for constructive dialogue on a scoped local issue under the Civic Leadership Dialogues architecture.

By the end, we aim to a neutral record distinguishes perspectives, verified evidence, disagreement, evidence gaps, options and owned next steps without manufacturing consensus.

We can discuss the approved civic issue, relevant evidence, differing perspectives, practical options and the authority for any next dialogue. We cannot decide, promise or resolve rotary endorsement of a speaker or position, partisan campaigning, personal attack, fabricated consensus or decisions outside the approved forum authority. The forum convenes dialogue and records outputs; only the named authorised body may make a decision, recommendation or commitment.

You may contribute by speaking, writing, using the approved assisted method or passing. You may pause or leave. Confirmed access and support arrangements are **[INSERT ONLY APPROVED PROVISIONS]**.

Our working agreement is to challenge ideas without attacking people, allow others to finish and make room for voices not yet heard. The capture boundary is: Neutral perspectives, evidence, disagreement, options and owned actions; no false consensus or implied endorsement **[ADD APPROVED ATTRIBUTION, ACCESS AND RETENTION WORDING]**.

If a safety or safeguarding concern arises, we will use the named approved route rather than investigate it in this group. What clarification would help you participate?

Configured close

Thank you for the care you brought to **[SESSION OR ACTIVATION NAME]**.

We have recorded the output under the authority stated at the start, distinguishing insight, questions, options, recommendations, decisions and actions. The next step is: Publish or circulate the approved neutral summary and transfer each owned action to M-T1-CL-01 Civic Leadership Dialogues.

[NEXT-STEP OWNER] owns it, due or reviewed by **[DATE]**. Parked items will receive a disposition, not an automatic promise of action. Participants will receive the approved update by **[FOLLOW-UP DATE]** through **[TESTED ROUTE]**.

Feedback is available through **[EVALUATION ROUTE AND ALTERNATIVE]**. Private access, conduct or safeguarding matters go to the named access or safeguarding route. Thank you; the formal interaction is now closed.

9. Public-engagement scripts

Use these only when the configured format involves optional brief public contact. Never block movement, pursue a decline or collect details before explaining purpose and choice.

15-second permission opener

Hello - I am with **[HOST ENTITY]**. We are here to convene government, business and community leaders for constructive dialogue on a scoped local issue under the Civic Leadership Dialogues architecture. May I ask one quick question about the approved civic issue, relevant evidence, differing perspectives, practical options and the authority for any next dialogue?

If no: **Of course. Thank you, and enjoy your day.**

45-second conversation

Hello - I am with **[HOST ENTITY]**. We are speaking with invited leaders, subject-matter contributors and approved observers or public participants. because convene government, business and community leaders for constructive dialogue on a scoped local issue under the Civic Leadership Dialogues architecture.

What evidence and lived experience should inform this issue?

Listen without interrupting, then say: **What I heard is [NEUTRAL REFLECTION]. Have I reflected that accurately?** Explain the approved capture boundary. If useful, offer: Publish or circulate the approved neutral summary and transfer each owned action to M-T1-CL-01 Civic Leadership Dialogues.

Two-minute conversation

State the purpose and boundary. Ask no more than three approved questions. Reflect the main point without turning it into agreement. Offer the configured next step only if wanted. End with thanks and no further pursuit.

- ☐ Visible opt-in posture and respectful disengagement are rehearsed.
- ☐ Paths, exits, mobility access and neighbouring activities remain clear.
- ☐ Long or private enquiries transfer to the approved side area and trained role.
- ☐ Child, safeguarding, conduct and emergency routes are briefed.
- ☐ Contact details use the private approved FO5 route where applicable.

10. Configured discussion-question plan

ID	Approved question	Quality basis	Response modes	Timebox	Capture category	Probe limit or risk control
Q1	What evidence and lived experience should inform this issue?	Open, neutral and in scope	Speak / write / assisted equivalent	_____ min	Theme / question / option	_____
Q2	Where do perspectives agree, and where do they materially differ?	Open, neutral and in scope	Speak / write / assisted equivalent	_____ min	Theme / question / option	_____
Q3	What evidence gap prevents a responsible next decision?	Open, neutral and in scope	Speak / write / assisted equivalent	_____ min	Theme / question / option	_____
Q4	Which option or next dialogue warrants an accountable owner?	Open, neutral and in scope	Speak / write / assisted equivalent	_____ min	Theme / question / option	_____

For every selected question:

- ☐ It asks one thing in familiar words and serves the desired outcome.
- ☐ It does not presume need, failure, agreement or willingness.
- ☐ It does not require personal, traumatic, health, family or identity disclosure.
- ☐ Passing and at least one non-spoken response method are genuine.
- ☐ Probes seek useful examples, not unnecessary personal detail.
- ☐ The scribe knows whether the output is a theme, question, option, recommendation or action.

Useful probes: **What leads you to that view? What is the practical effect? Who else is affected? What assumption should we test? Have I reflected your point accurately?**

11. Inclusive participation and airtime controls

Method	Best use	Configured control
Quiet reflection	Reduces speed and status advantage	Show the prompt in writing and allow enough time
Optional round	Offers each person a turn	Passing requires no explanation
Pair or trio	Supports smaller-group participation	Provide a non-paired alternative
Written or digital response	Supports concise or remote input	Explain identity, access and retention
Poll or prioritisation	Tests patterns	Do not call it binding unless authority permits
Follow-up response	Allows considered later input	State deadline, privacy and consideration method

Interventions to rehearse:

- Repeated interruption: **I am pausing us so the speaker can finish. I will come to you next.**
- Dominant voice: **Thank you. I am holding that point while we invite people not yet heard.**
- Silence: **Take a moment. You may speak, write, use the approved alternative or pass.**
- Group generalisation: **Let us keep to what we know directly and not ask one person to represent a community.**
- Facilitator error: **I framed that poorly. I will correct it and ask more neutrally.**

12. Difficult-conversation, safety and safeguarding protocol

Dissent includes challenge, criticism, frustration, emotion and refusal. Facilitate it. Disruption is observable conduct that prevents safe participation, such as repeated interruption after redirection, personal attack, discriminatory abuse, threat, intimidation or targeted harassment.

1. Pause and name the observable behaviour.
 2. Restate the conduct boundary and invite a reset.
 3. Limit the floor or take a short break.
 4. Use a private sidebar with two authorised team members where practical.
 5. End participation through the approved route when behaviour continues.
 6. Stop facilitation and use the emergency route for immediate danger.
- ☐ Do not infer motive, diagnosis or character.
 - ☐ Do not physically intervene outside training and authority.
 - ☐ Protect a person targeted by abuse without requiring public explanation.
 - ☐ Record factual observations, times, action and owner only in the approved incident route.

If a safeguarding concern is disclosed or observed:

1. Listen without pressing for detail.
2. Thank the person for raising it.
3. Do not promise secrecy.
4. Explain that the approved safeguarding route must be used.
5. Ask only what is needed for immediate participation or safe departure.
6. Record the minimum factual information separately from session notes.
7. Report promptly to the named safeguarding lead.
8. Use the alternate route if the primary contact is unavailable or involved.

Response wording: Thank you for telling me. I will not ask you to repeat more than is needed now. I cannot promise to keep this only between us; I must use the approved safeguarding route so the authorised person can respond. What do you need now to participate, pause or leave safely?

13. Capture, decision and parking-lot records

Live capture rules:

- Show the category: theme, question, option, recommendation, decision, action or parked item.
- Ask whether a paraphrase is accurate.
- Remove names unless attribution is approved and necessary.
- Keep safeguarding, health, access, complaints and sensitive personal information out of shared notes.
- Record disagreement rather than forcing consensus.
- Confirm authority before labelling a decision.
- Read back actions with owner and date.

ID	Exact decision or recommendation	Authority	Evidence or rationale	Owner	Due or review date	Communication route
D____	_____	_____	_____	_____	_____	_____

Parked item	Why parked	Disposition owner	Agreed disposition	Due	Participant update route
_____	Out of scope / evidence / authority / privacy / safety	_____	Answer / refer / schedule / decline / retain	_____	_____

A parked item receives a disposition, not a promise that it will be adopted.

14. Handoff matrix

Matter	Immediate facilitator action	Receiving role	Required record	Accepted
Access request	Receive privately; do not ask for diagnosis	Access contact	Adjustment, response, owner and due time	[]
Safeguarding concern	Apply the protocol	Safeguarding lead or alternate	Restricted factual record	[]
Immediate danger	Stop if necessary and use emergency route	Emergency and safety roles	Approved incident record	[]
Disruptive conduct	Apply graduated response	Safety lead	Observable conduct, steps, time and outcome	[]
Complaint	Acknowledge and provide route	Session owner or complaints owner	Issue, permission, owner and date	[]

Matter	Immediate facilitator action	Receiving role	Required record	Accepted
Media enquiry	Do not improvise a response	Authorised spokesperson	Enquirer, question, deadline and route	[]
Partnership interest	Avoid commitments	Partnership owner	Organisation, interest, consent and next date	[]
Volunteer or membership interest	Offer low-pressure chosen route	Follow-up owner	Interest scope, permission, owner and date	[]
Technical failure	State issue and alternative	Technical owner	Impact, workaround and unresolved access	[]
Out-of-scope question	Record neutrally	Parking owner	Disposition and update route	[]

15. Follow-up, evaluation and debrief

Same day

- [] Secure attendance, notes, decisions and actions in approved locations.
- [] Transfer urgent safety, safeguarding, incident and access matters immediately.
- [] Separate and restrict sensitive records; remove test and informal copies.

Within 24 hours

- [] Facilitator and session owner validate themes, dissent, decisions and actions.
- [] Each action has authority, owner and due date.
- [] Factual errors are corrected before distribution.
- [] Thanks are sent only where planned and permitted.

By the promised follow-up date

- [] Participants receive what was heard at the promised level.
- [] Decisions, open items, parked-item dispositions and next actions are accurately stated.
- [] Resources and response routes work and are accessible.
- [] Raw notes are not published when a thematic summary was promised.
- [] Names and organisations are not disclosed without permission.

Participant pulse:

1. I understood the purpose and what this interaction could influence.
2. I had a workable way to participate.
3. I understand what happens next and when.
4. What should be kept?
5. What should change?

Measure	Configured definition	Target	Actual	Evidence	Interpretation
Attendance or interactions	Actual count under the approved method	—	—	_____	Not agreement or impact
Participation reach	People using a contribution route where appropriate to count	—	—	_____	Do not identify people who pass
Configured outcome	A neutral record distinguishes perspectives, verified evidence, disagreement, evidence gaps, options and owned next steps without manufacturing consensus.	—	—	_____	_____
Action closure	Actions completed by due date divided by actions due	____%	____%	_____	State small denominators

Measure	Configured definition	Target	Actual	Evidence	Interpretation
Parking disposition	Items with communicated disposition divided by items recorded	____%	____%	_____	Not every item is adopted
Access delivery	Confirmed provisions delivered and requests answered	100%	____%	_____	No personal details
Follow-up timeliness	Promised update sent by date	100%	____%	_____	Quality as well as speed

16. Change control, sign-off and release gate

Version	Date	Exact code and title	Change and reason	Author	Reviewers	Status
0.1	2 August 2026	M-T1-CP-20-SD-01 — Forum Facilitation Guide	First configured REVIEW derivative	Codex working team	Pending	REVIEW
_____	_____	M-T1-CP-20-SD-01 — Forum Facilitation Guide	_____	_____	_____	_____

Approval role	Name	Decision	Date	Evidence location
Session owner	_____	Ready / Return / Stop	_____	_____
Lead facilitator	_____	Script and timing rehearsed / Return	_____	_____
Accessibility reviewer	_____	Approved / Conditions / Return	_____	_____
Privacy and capture reviewer	_____	Approved / Conditions / Return	_____	_____
Safeguarding and safety leads	_____	Approved / Conditions / Return	_____	_____
Initiative lead	_____	Approve / Return / Reject	_____	_____

- ☐ Exact code, title, source, disposition, canonical parent and migration route match index v1.1.
- ☐ Purpose, audience, outcome, scope and authority are unambiguous.
- ☐ Every role, handoff and escalation route is named and accepted.
- ☐ Agenda protects access, participation, synthesis, actions and close.
- ☐ Opening, public-interaction and closing scripts sound natural when spoken.
- ☐ Passing and more than one contribution method are genuine.
- ☐ Privacy, safeguarding, disruption and emergency boundaries are rehearsed.
- ☐ Outputs are accurately labelled and every action has owner and date.
- ☐ All local controlled fields are complete or formally accepted as N/A.
- ☐ Editable and accessible distribution copies carry matching version data.
- ☐ Final export is structurally checked and visually reviewed before release.
- ☐ Release evidence and checksum exist before Status changes from REVIEW.

Review decision and comments: _____