



F04 CONFIGURED SUPPORTING DOCUMENT

Partnership Invitation Template

A controlled, editable working derivative for M-T1-CP-21-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.

Release control

Field	Controlled value
Status	REVIEW — configured derivative; not approved for distribution
Derivative version	v0.1
Supporting-document code	M-T1-CP-21-SD-02
Exact derivative title	Partnership Invitation Template
Source initiative	M-T1-CP-21 - Community Partnership Breakfast
Source initiative code	M-T1-CP-21
Source initiative title	Community Partnership Breakfast
Initiative disposition	Absorbed as overlay
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	Multi-Party Partnership Discovery Breakfast
Redirect or tombstone route	Permanent overlay alias from M-T1-CP-21 to M-T1-CP-09; retain M-T1-CP-21-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 B — Professional invitation; conversation-first breakfast configuration

Adaptation note

For leaders from organisations, businesses and community groups, using breakfast for relationship-building. Frame the ask as participation in a conversation, not an assumed partnership. State exact breakfast timing, cost, dietary/access route, discussion purpose, attendee expectations and how potential ideas will be taken forward. The primary action is to RSVP and identify the most relevant representative. Follow with confirmation, dietary/access checking, thanks and a separately agreed partnership conversation.

Instructions

1. Use only as the Multi-Party Partnership Discovery Breakfast overlay under M-T1-CP-09; keep the CP-21 asset code.
 2. Address one organisation and one appropriate role per invitation. Explain why that organisation's perspective is relevant without implying endorsement or a prior partnership.
 3. Describe the breakfast as a structured discovery conversation. Do not promise projects, funding, referrals, exclusivity or a partnership outcome.
 4. Collect only the representative, response and dietary/access information needed for this event; keep future-contact permission separate.
 5. A promising idea moves to a separately scoped and authorised follow-up, not an informal commitment made at breakfast.
 6. Resolve every field and complete initiative, privacy, access, dietary, budget and communications review before sending.
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Controlled fields

Field	Completion instruction	Evidence
{{FIRST_NAME}} / {{ORGANISATION_NAME}}	Enter the authorised contact and organisation names.	Professional contact record
{{HOST_ENTITY}}	Enter the accountable Rotary entity.	Initiative approval
{{INVITATION_REASON}}	State the truthful reason this organisation's perspective is relevant.	Partnership discovery plan
{{PUBLIC_EVENT_NAME}}	Enter the approved breakfast title.	Event brief
{{DISCUSSION_PURPOSE}}	State the community question or partnership-discovery purpose.	Canonical CP-09 brief
{{VALUE_PROMISE}}	State the practical value of a cross-organisation conversation without promising an outcome.	Message brief
{{ATTENDEE_EXPECTATIONS}}	State who should attend, preparation, contribution and conduct expectations.	Participant brief
{{IDEA_FOLLOW_UP_PROCESS}}	Explain how ideas are recorded, assessed and moved to separately authorised conversations.	Partnership governance plan
{{EVENT_DATE_LONG}} / {{START_TIME}} / {{END_TIME}} / {{TIME_ZONE}} / {{ARRIVAL_TIME}}	Enter full confirmed breakfast and arrival timing.	Venue confirmation and run sheet
{{VENUE_NAME}} / {{VENUE_ADDRESS}}	Enter the confirmed venue and complete address.	Venue confirmation
{{COST_TEXT}}	State the approved cost, inclusion or "No charge".	Budget approval

Field	Completion instruction	Evidence
{{DIETARY_ROUTE}}	Enter the monitored route and deadline for dietary information.	Catering/privacy plan
{{ACCESSIBILITY_SUMMARY}} / {{ACCESSIBILITY_CONTACT}}	State specific confirmed provisions and a monitored adjustment route.	Accessibility review
{{RSVP_DEADLINE}} / {{RSVP_URL}}	Enter the deadline and tested RSVP/representative-identification route.	Registration plan and link test
{{PRIMARY_CONTACT_NAME}} / {{PRIMARY_CONTACT_EMAIL}} / {{PRIMARY_CONTACT_PHONE}}	Enter the monitored partnership contact.	Contact approval
{{PRIVACY_NOTICE_URL}} / {{PREFERENCE_ROUTE}}	Enter tested privacy and communication-preference routes.	Privacy and communications review

Configured partnership invitation

Subject: Invitation to a partnership discovery breakfast: {{PUBLIC_EVENT_NAME}}

Hello {{FIRST_NAME}},

{{HOST_ENTITY}} invites {{ORGANISATION_NAME}} to join **{{PUBLIC_EVENT_NAME}}** on {{EVENT_DATE_LONG}}.

{{DISCUSSION_PURPOSE}} We are approaching your organisation because {{INVITATION_REASON}}. {{VALUE_PROMISE}}

This is an invitation to a conversation, not an assumption that your organisation will enter a partnership or support a particular proposal.

What participation involves

- **Breakfast time:** {{START_TIME}}–{{END_TIME}} {{TIME_ZONE}}
- **Arrival:** {{ARRIVAL_TIME}}
- **Venue:** {{VENUE_NAME}}, {{VENUE_ADDRESS}}
- **Cost and inclusions:** {{COST_TEXT}}
- **Who should attend and what to prepare:** {{ATTENDEE_EXPECTATIONS}}
- **Dietary information:** {{DIETARY_ROUTE}}
- **Access arrangements:** {{ACCESSIBILITY_SUMMARY}}
- **How possible ideas will be taken forward:** {{IDEA_FOLLOW_UP_PROCESS}}

Please RSVP by {{RSVP_DEADLINE}} at {{RSVP_URL}} and identify the representative best placed to join the discussion. Questions or access requests can go to {{PRIMARY_CONTACT_NAME}} at {{PRIMARY_CONTACT_EMAIL}} / {{PRIMARY_CONTACT_PHONE}} or {{ACCESSIBILITY_CONTACT}}.

Attendance does not create a partnership, endorsement, funding commitment or exclusivity arrangement. Any potential next step will be discussed and authorised separately.

Thank you for considering the invitation. We value a clear answer either way.

Warm regards, {{PRIMARY_CONTACT_NAME}} {{HOST_ENTITY}}

Privacy: Response, dietary and access information will be handled as described at {{PRIVACY_NOTICE_URL}}. **Communication preferences:** {{PREFERENCE_ROUTE}}

Breakfast and follow-up checklist

- ☐ CP-21 is presented as the breakfast overlay under CP-09, not as a separate canonical initiative.
- ☐ Organisation relevance and the appropriate representative role are documented.
- ☐ Discussion purpose, participant expectations and idea-assessment route are approved.
- ☐ Copy makes no partnership, funding, endorsement, referral or exclusivity promise.
- ☐ Timing, venue, cost, catering, dietary deadline and access provisions are final.
- ☐ Dietary/access data is minimised, access-restricted and covered by the approved privacy route.
- ☐ RSVP, representative identification, privacy, preference and correction routes pass testing.
- ☐ Confirmation and final practical reminder are ready before invitations are issued.
- ☐ Thanks and any partnership conversation are separate, owned follow-ups based on an explicit agreement.
- ☐ Declines and no-further-contact requests are recorded and suppressed.
- ☐ The final invitation contains no unresolved double-brace fields.

Review record

Review domain	Reviewer	Outcome / required change	Date
Canonical overlay and partnership scope			
Event, catering and budget			
Communications and proof			
Privacy, dietary and contact handling			
Accessibility and response pathway			
Final approval			