



F04 CONFIGURED SUPPORTING DOCUMENT

Partner Invitation Template

A controlled, editable working derivative for M-T1-CP-26-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-26-SD-02
Exact derivative title	Partner Invitation Template
Source initiative	M-T1-CP-26 - Rotary Community Service Expo
Source initiative code	M-T1-CP-26
Source initiative title	Rotary Community Service Expo
Initiative disposition	Absorbed as overlay
Canonical parent	M-T1-CP-18 - Rotary Community Expo
Canonical parent code and title	M-T1-CP-18 - Rotary Community Expo
Named overlay or migration label	Volunteer Opportunity Expo
Redirect or tombstone route	Permanent overlay alias from M-T1-CP-26 to M-T1-CP-18; retain M-T1-CP-26-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; Volunteer Opportunity Expo overlay

Adaptation note

For community organisations contributing volunteer opportunities to a service expo. Treat this as the Volunteer Opportunity Expo variant under the canonical M-T1-CP-18 architecture. Ask partners to describe real, current opportunities and supply approved eligibility, onboarding, safety, insurance,

contact, access and follow-up details. Avoid duplicating a separate generic expo campaign. The primary action is to submit an opportunity and confirm participation. Validate opportunity information, issue one operational confirmation, thank partners and reconcile enquiries/referrals under the agreed process.

Instructions

1. Use only for the Volunteer Opportunity Expo overlay under M-T1-CP-18; keep the exact CP-26 supporting-document code.
2. Address one organisation and one responsible contact. Explain why its current volunteer opportunities are relevant to the expo audience.
3. Ask for current, open and supportable opportunities only. Do not publish expressions of future intent as active roles.
4. Require the partner to complete the opportunity-information block before written participation confirmation.
5. Confirm who receives enquiries, who assesses or onboards prospective volunteers, how referrals are recorded and what feedback returns to the expo team.
6. Do not imply Rotary endorsement, verification of the organisation, guaranteed referrals, funding, exclusivity or a legal partnership.
7. Resolve every controlled field and complete opportunity, safety, insurance, access, privacy, brand, rights and operational review before sending.

Controlled fields

Field	Completion instruction	Evidence
{{FIRST_NAME}} / {{ORGANISATION_NAME}}	Enter the authorised recipient and organisation names.	Professional contact record
{{HOST_ENTITY}}	Enter the official entity hosting the canonical expo.	Initiative approval
{{INVITATION_REASON}}	State why the organisation's current opportunities fit the Volunteer Opportunity Expo purpose.	Partner outreach plan
{{PUBLIC_EVENT_NAME}}	Enter the approved expo public title.	Event brief
{{PURPOSE_SENTENCE}} / {{VALUE_PROMISE}}	State the expo purpose and practical value without guaranteeing enquiries or placements.	Initiative/message briefs
{{OPPORTUNITY_SUBMISSION_ROUTE}} / {{SUBMISSION_DEADLINE}}	Enter the tested route and deadline for the controlled opportunity record.	Partner intake configuration and link test

Field	Completion instruction	Evidence
{{REQUIRED_OPPORTUNITY_INFORMATION}}	List the mandatory role, task, location, time, eligibility, onboarding, supervision, safety, insurance, access and contact information.	Opportunity governance plan
{{VALIDATION_AND_APPROVAL_PROCESS}}	Explain the fact, safety, access, privacy, brand and rights checks required before publication.	Expo production plan
{{ENQUIRY_AND_REFERRAL_PROCESS}}	Explain who receives enquiries, handles introductions/referrals, records outcomes and responds to people.	Referral/data-handling plan
{{EVENT_DATE_LONG}} / {{START_TIME}} / {{END_TIME}} / {{TIME_ZONE}}	Enter confirmed public expo timing.	Venue confirmation/run sheet
{{ARRIVAL_TIME}} / {{SETUP_WINDOW}} / {{PACK_DOWN_WINDOW}}	Enter partner arrival, setup and pack-down timing.	Operational run sheet
{{VENUE_NAME}} / {{VENUE_ADDRESS}} / {{PARTNER_ENTRY_ROUTE}}	Enter confirmed venue and partner loading/entry route.	Venue/site plan
{{SPACE_EQUIPMENT_POWER}}	State approved footprint, furniture, display, equipment and power provisions/limits.	Floor plan and technical brief
{{PARTNER_STAFFING_AND_CONDUCT}}	State staffing, passes, breaks, conduct and public-engagement conditions.	Participant/people plan
{{DATA_CAPTURE_RULES}}	State whether direct data capture is allowed and the approved notice, consent and sharing rules.	Privacy review
{{BRAND_CONTENT_AND_RIGHTS}}	State requirements for marks, images, opportunity claims, handouts and public approval.	Brand and rights review
{{SAFETY_AND_INSURANCE}}	State only approved safety, insurance and activity restrictions.	Safety/insurance decision
{{ACCESSIBILITY_SUMMARY}}	State specific confirmed expo and partner access provisions.	Accessibility review
{{COST_TEXT}}	State the approved partner cost, contribution, inclusion or “No charge”.	Budget/commercial approval
{{RSVP_DEADLINE}} / {{RSVP_URL}}	Enter the accept/decline/question deadline and tested route.	Partner response plan and link test
{{PRIMARY_CONTACT_NAME}} / {{PRIMARY_CONTACT_EMAIL}} / {{PRIMARY_CONTACT_PHONE}}	Enter the monitored partner liaison.	Contact approval

Field	Completion instruction	Evidence
{{PRIVACY_NOTICE_URL}} / {{PREFERENCE_ROUTE}}	Enter tested privacy and communication-preference routes.	Privacy and communications review

Configured partner invitation

Subject: Invitation to contribute volunteer opportunities to {{PUBLIC_EVENT_NAME}}

Hello {{FIRST_NAME}},

{{HOST_ENTITY}} invites {{ORGANISATION_NAME}} to consider contributing current volunteer opportunities to **{{PUBLIC_EVENT_NAME}}** on {{EVENT_DATE_LONG}}.

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

The invitation

We are asking {{ORGANISATION_NAME}} to submit one or more real, currently available volunteer opportunities for validation and, if approved, present them at the expo.

Submit the opportunity information by {{SUBMISSION_DEADLINE}} at {{OPPORTUNITY_SUBMISSION_ROUTE}}.

Required opportunity information

{{REQUIRED_OPPORTUNITY_INFORMATION}}

How submissions and enquiries will be handled

- **Validation and approval:** {{VALIDATION_AND_APPROVAL_PROCESS}}
- **Enquiries, introductions and referrals:** {{ENQUIRY_AND_REFERRAL_PROCESS}}
- **Visitor data capture:** {{DATA_CAPTURE_RULES}}
- **Brand, content and rights:** {{BRAND_CONTENT_AND_RIGHTS}}

Expo participation details

- **Public event:** {{EVENT_DATE_LONG}}, {{START_TIME}}–{{END_TIME}} {{TIME_ZONE}}
- **Venue:** {{VENUE_NAME}}, {{VENUE_ADDRESS}}
- **Arrival/setup:** {{ARRIVAL_TIME}}; {{SETUP_WINDOW}}
- **Pack-down:** {{PACK_DOWN_WINDOW}}
- **Partner entry/loading:** {{PARTNER_ENTRY_ROUTE}}
- **Space, equipment and power:** {{SPACE_EQUIPMENT_POWER}}
- **Partner staffing and conduct:** {{PARTNER_STAFFING_AND_CONDUCT}}
- **Safety and insurance:** {{SAFETY_AND_INSURANCE}}
- **Access arrangements:** {{ACCESSIBILITY_SUMMARY}}

- **Cost or approved contribution:** {{COST_TEXT}}

Please accept, decline or request a scoping conversation by {{RSVP_DEADLINE}} at {{RSVP_URL}}, or contact {{PRIMARY_CONTACT_NAME}} at {{PRIMARY_CONTACT_EMAIL}} / {{PRIMARY_CONTACT_PHONE}}.

Participation is confirmed only when {{HOST_ENTITY}} validates the opportunity information and issues written operational confirmation. This invitation does not create endorsement, guaranteed referrals, funding, exclusivity or a legal partnership.

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

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

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

Opportunity validation record

Control	Partner entry	Reviewer / evidence	Outcome
Opportunity is current and accepting enquiries			
Role purpose, tasks, location and time			
Eligibility, age, screening and onboarding			
Supervision, training and support			
Safety, equipment and insurance			
Physical, communication and participation access			
Named public and operational contacts			
Enquiry/referral response standard			
Data collection, notice, consent and sharing			
Claims, marks, images, handouts and rights			
Review/expiry date for opportunity information			

Partner readiness and release checklist

- ☐ CP-26 is identified as the Volunteer Opportunity Expo overlay under CP-18, with no duplicate generic expo campaign.
- ☐ Organisation relevance and each opportunity's current availability are evidenced.
- ☐ Role, eligibility, onboarding, supervision, safety, insurance, access, contact and follow-up details pass validation.

- ☐ Enquiry/referral roles, response time, records, privacy boundaries and feedback process are agreed.
- ☐ Invitation creates no endorsement, guaranteed referral, funding, exclusivity or legal partnership promise.
- ☐ Venue, setup, pack-down, space, power, staffing, conduct, safety, access and cost conditions are final.
- ☐ Submission, RSVP, privacy, preference and correction routes pass direct, mobile and keyboard testing.
- ☐ One written operational confirmation and one 72-hour reminder are prepared; duplicate instructions are suppressed.
- ☐ Partner thanks and any later partnership discussion are separate, agreed follow-ups.
- ☐ Public opportunity information has an owner and recheck/expiry date.
- ☐ The release candidate contains no unresolved double-brace fields.

Review record

Review domain	Reviewer	Outcome / required change	Date
Canonical overlay and opportunity relevance			
Opportunity, safety and insurance validation			
Accessibility			
Privacy, enquiry and referral handling			
Brand, rights and public claims			
Event operations and final approval			