



Corporate SCREEN Checklist

Top 3 - MAP

AdvanceU 1st Consultants © 2023

MAP

We employ a strategy we call MAP to help organizations position their planning activities to support scalable and sustainable growth in their engagement and revenue generation. We help you create resources that can effectively engage your entire organization, so your plans can do more than take up space on shelf.

- Measured** - What will you track and what does success look like?
- Analyzed** - Have you defined the problem and how are you are going to solve it?
- Practical** - Are your goals attainable and do you have the resources you need?

We Are Here To Help

We have developed a number of resources to help your organizational planning and preparedness through these proven techniques. Whether you are just getting started or you're ready to take your planning to the next level, we can help.

In This Resource

This resource provides information and strategies to support the Research, Explore, and Assess portion of our REACH strategy.

- It starts with values
- Determining measurement and alignment
- Using your corporate screen to create dialogue and empower decisions

Check out our other planning resources so you can MAP out your goals with confidence, or contact us directly if you would like us to set up a tailored planning and preparedness strategy.

Pommashea Noel-Bentley, MBA (she/hers)
Managing Partner
pommashea@advanceu1st.com

Scott Blythe (he/his)
Senior Partner
scott@advanceu1st.com



www.advanceu1st.com





Corporate Screen Checklist

Top 3 - MAP

Page 2

Where to Start

Working with businesses is a great way to increase the unrestricted revenue into your organization. However, not all businesses are a good fit. For example, a charity focused on advancing human rights, may not wish to engage with companies that have no internal equity practices for their employees. Most charities and non-profits are values based, and if your key audiences feel that you have 'sold out', you could irreparably harm your regard and reputation.

- Start with Your Values** – The top three should suffice, but it is up to you.
- Do Your Research** – Think about what you want to see from businesses and look for it in their CSR strategy, presence in the community, policies and practices, marketing, other organizations they work with, to name a few.
- Make Some Decisions** – Focus on three or four examples of practices/behaviours for each value. This will form the basis of how you evaluate potential business partners.
- Keep Track** – Write down what you have learned. Information on the organization, its established community pillars, community investments, marketing language, and recommended engagement strategy if approved.

Measurement and Alignment

Your corporate screen will help you make decisions based upon established organizational values. To ensure the process is transparent, fair, and accountable, each potential sponsor should be evaluated through the screen. Creating a consistent measure will allow you to demonstrate how you quantified qualitative behaviours so that you, or your board, can respond to enquires, should someone believe a specific sponsor is not a fit later on.

- Within each value, you have established three or four behaviours to measure. Each of these need to have a weight. We typically use (1-3). The higher the weight, the more important it is for a potential business partner to demonstrate it. This is a static value and does not change across each evaluation. Thus, it provides the base for your metric.
- The second measure is what we call a rating. We typically use a scale of (0-4), four being the best fit, zero being no fit. A potential business partner is then rated based upon your research to determine how well they embody this behaviour/practice.
- The final area is the score, which is the weight * rating. This will give you a measure to demonstrate how every potential business partners aligns with your organizational values.



www.advanceu1st.com





Corporate Screen Checklist

Top 3 - MAP

Page 3

Creating Dialogue

We recommend reviewing your corporate screen once every few years to align with your strategic planning. In our experience, the real benefit of a corporate screen is its ability to facilitate dialogue and decision-making with the board / membership around values-based protocols. Over time, this can build trust and ensures that sponsorships can increase both the revenue into your organization, but also your regard and profile.

- Engage Your Board First** – Before you seek out sponsorships, engage your board. This avoids the conflicts that can arise from personal feelings about specific companies.
- Develop Key Language** – Once your board has approved and weighted the values, develop key language to encourage dialogue. Many organizations are member-led, and as such, members are more likely to ask a board member, who is also their friend, before speaking with staff. Creating consistent messaging can help ensure individual board members are not inadvertently ambushed and that everyone is saying the same thing.
- Keep Track of Your Decisions** – Overtime, your corporate screen can provide your organization with insight about who you have engaged with and why. This can inform future decisions. Additionally, it will also help you speak to your values if a company that was / is a sponsor, suddenly finds itself in hot water.

A corporate screen can provide your charity or non-profit with a scorecard to help ensure that organizational values are considered when engaging with potential sponsors. Manage your corporate engagement with confidence to know that values will guide decisions.



www.advanceu1st.com

