

Is This the Right Company to Put Beside Your Name?

A corporate screen gives your organization a consistent way to answer that question. Complete these steps in order. When you cannot check a step, you have identified a conversation that needs to happen before companies are approached.

In This Checklist

- ☐ Build Your Foundation
- ☐ Decide How Your Screen Will Work
- ☐ Prepare Your Organization to Use It

Why You Can Trust This Resource

This checklist draws from our professional experience helping organizations assess corporate alignment, opportunity, and risk.

Our work does not stop at identifying what needs to be decided. A facilitated in-service can help leadership, fundraising, and the board reach agreement and build decision clarity. An integrated sponsorship strategy can turn those decisions into a practical process for corporate outreach, agreements, fulfilment, reporting, and renewal.

AdvanceU 1st Consultants has over 50 years of combined experience and is a BBB Accredited Business with an A+ rating. We bring the evidence forward, name concerns clearly, and help organizations make decisions they can stand behind.

To discuss how to leverage this resource within your organization, contact info@advanceu1st.com

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Build Your Foundation

☐ Clarify what sponsorship needs to achieve.

Identify the organizational priorities that sponsorship could advance. Consider what a successful relationship would need to achieve for your organization, the company, and the people or communities connected to your work.

This step is complete when you can explain why your organization is pursuing sponsorship without referring only to revenue.

☐ Choose the values that will guide corporate engagement decisions.

Select the organizational values most relevant to a corporate relationship. Focus on the values that will help you distinguish between a welcome contribution and an appropriate partner.

This step is complete when leadership, fundraising, and the board agree on the values the screen needs to protect.

☐ Translate each value into evidence you can examine.

For each value, identify the business practices, behaviours, investments, or commitments that would demonstrate alignment. Consider its core business, employment practices, community investments, partnerships, and public conduct.

This step is complete when the criteria are specific enough that two people reviewing the same evidence could reach a similar conclusion.

☐ Establish the organization's non-negotiables.

Identify the industries, products, practices, behaviours, or forms of corporate involvement that would conflict with your mission or place community trust at risk. Include any access, recognition, influence, or public association your organization would not offer.

This step is complete when everyone understands which concerns cannot be offset by the size of a contribution.

Decide How Your Screen Will Work

☐ Set the research requirements.

Decide what information needs to be reviewed before a company is approached or approved. This may include its core business, community-investment priorities, policies, existing partnerships, regulatory history, public reporting, and credible media coverage.

This step is complete when the organization knows what evidence is required, where it will look, and what happens when important information is unavailable.

☐ Establish how alignment and concern will be described.

Use consistent language to distinguish between strong alignment, partial alignment, weak alignment, and significant concern. Identify which criteria deserve greater weight and which findings require an automatic pause.

This step is complete when the organization can explain how evidence informs the decision without allowing areas of alignment to erase a non-negotiable concern.

☐ Clarify who has authority.

Determine who conducts the research, recommends a company, approves outreach, negotiates commitments, and gives final approval. Also decide who can pause or end a relationship when circumstances change.

This step is complete when fundraising knows what it has authority to advance and which decisions belong to leadership or the board.

☐ Create a decision record.

Document the evidence reviewed, areas of alignment, concerns, unanswered questions, final decision, rationale, conditions, and approval.

This step is complete when the organization can explain why a company was pursued, declined, or held for further review.

Prepare Your Organization to Use It

☐ **Develop consistent language for difficult decisions.**

Agree on how staff, leadership, and board members will explain the organization's approach to corporate relationships. This includes how they will respond when a well-connected company, a significant contribution, or a personal opinion creates pressure to bypass the screen.

This step is complete when the people representing the organization can explain the decision without improvising or contradicting one another.

☐ **Test the screen before using it.**

Apply the draft screen to several previous, current, or hypothetical corporate opportunities. Look for criteria that are too broad, evidence that is difficult to find, and areas where reviewers reach different conclusions.

This step is complete when the screen produces a useful discussion and a decision the organization can support.

☐ **Set a review schedule.**

Review the screen alongside strategic planning and when organizational priorities, community expectations, or sponsorship activities change. Revisit approved relationships when agreements are renewed or new information emerges.

This step is complete when responsibility for reviewing the screen and existing relationships has been assigned.

AI transparency: AdvanceU 1st Consultants developed the framework and guidance in this resource. We used generative AI to help organize the material and support drafting and editing. We refined and approved the final content, and the professional judgment and final editorial decisions are ours.