Sponsorship and Donation Discussion Worksheet

Use: prepare the facts for your School's authorized reviewers. This worksheet does not determine tax status, deductibility, legal compliance or whether an agreement is enforceable. Complete it in your own approved records; no email or account is required to use it.

How to use this worksheet

Record the arrangement context, then work through each discussion question. Keep notes tied to their source and identify the reviewer or next action. Leave uncertain or conflicting information unresolved. The decision record is for the authorized reviewer; this worksheet returns no score or classification.

Do not place confidential arrangement details into public website forms or ordinary marketing analytics. Retain the completed worksheet in your School's approved systems.

Completing this document does not create or change a VarsityProof record. Upload and import are not currently available.

Arrangement context

Field	School entry
School / receiving entity Field ID context.receiving_entity	
Prepared by / role Field ID context.prepared_by_role	
Date Field ID context.prepared_date	
Arrangement reference Field ID context.arrangement_reference	

Discussion questions 1 and 2

1. What support is proposed: money, property, services or another contribution?

Field	School entry
Notes / source document Field ID discussion.proposed_support.notes_source	
Reviewer or next action Field ID discussion.proposed_support.reviewer_next_action	

2. What is its stated purpose? Are restrictions proposed?

Field	School entry
Notes / source document Field ID discussion.purpose_restrictions.notes_source	
Reviewer or next action Field ID discussion.purpose_restrictions.reviewer_next_action	

Discussion questions 3 and 4

3. Who receives the support, and who has authority to accept it?

Field	School entry
Notes / source document Field ID discussion.recipient_acceptance_authority.notes_source	
Reviewer or next action Field ID discussion.recipient_acceptance_authority.reviewer_next_action	

4. What has been promised in proposals, messages or conversations?

Field	School entry
Notes / source document Field ID discussion.promises_sources.notes_source	
Reviewer or next action Field ID discussion.promises_sources.reviewer_next_action	

Discussion questions 5 and 6

5. What exact recognition or promotional wording/artwork is proposed?

Field	School entry
Notes / source document Field ID discussion.wording_artwork.notes_source	
Reviewer or next action Field ID discussion.wording_artwork.reviewer_next_action	

6. Are tickets, hospitality, exclusivity, brand rights or other benefits included?

Field	School entry
Notes / source document Field ID discussion.additional_benefits.notes_source	
Reviewer or next action Field ID discussion.additional_benefits.reviewer_next_action	

Discussion questions 7 and 8

7. Are payment amounts or other terms conditional on attendance, exposure or outcomes?

Field	School entry
Notes / source document Field ID discussion.conditional_terms.notes_source	
Reviewer or next action Field ID discussion.conditional_terms.reviewer_next_action	

8. What component/value information does the financial reviewer need?

Field	School entry
Notes / source document Field ID discussion.component_value_information.notes_source	
Reviewer or next action Field ID discussion.component_value_information.reviewer_next_action	

Discussion questions 9 and 10

9. What approvals or questions remain unresolved before acceptance?

Field	School entry
Notes / source document Field ID discussion.unresolved_approvals.notes_source	
Reviewer or next action Field ID discussion.unresolved_approvals.reviewer_next_action	

10. Who approves the agreement, acknowledgment, invoice or receipt as applicable?

Field	School entry
Notes / source document Field ID discussion.document_approval.notes_source	
Reviewer or next action Field ID discussion.document_approval.reviewer_next_action	

Discussion questions 11 and 12

11. Where will the approved financial and advancement records be kept?

Field	School entry
Notes / source document Field ID discussion.financial_record_location.notes_source	
Reviewer or next action Field ID discussion.financial_record_location.reviewer_next_action	

12. Who owns benefit delivery, due dates, Evidence collection and separate verification?

Field	School entry
Notes / source document Field ID discussion.delivery_evidence_verification.notes_source	
Reviewer or next action Field ID discussion.delivery_evidence_verification.reviewer_next_action	

Authorized reviewer decision record

Completed by the authorized reviewer.

Field	School entry
Reviewer / role Field ID review.reviewer_role	
Decision and applicable guidance/policy reference Field ID review.decision_policy_reference	
Open question / owner / next review date Field ID review.open_question_owner_review_date	

Do not place confidential arrangement details into public website forms or ordinary marketing analytics.
Retain the completed worksheet in your School's approved systems.

References and template identity

These references support the companion educational guide. They do not classify a particular arrangement or constitute professional approval.

IRS guidance on acknowledgment and advertising

https://www.irs.gov/charities-non-profits/advertising-or-qualified-sponsorship-payments

IRS Publication 598

https://www.irs.gov/publications/p598

IRS quid pro quo guidance

https://www.irs.gov/charities-non-profits/charitable-organizations/charitable-contributions-quid-pro-quo-contributions

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K–12 Sponsorship Operations

https://varsityproof.com/schools/resources

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