FIRST® Fundraising Toolkit

Section 1.1 - Fundraising Plan Overview

The *FIRST®* Fundraising Plan Overview is a key component of a team business plan that is specifically focused on team fundraising and Sponsor benefits. The overview has been created to help teams organize their fundraising efforts. A team has to have a clear understanding of their strengths, weaknesses, benefits of sponsorship, and impact before they can start approaching Sponsors to create a partnership. The Fundraising Plan Overview helps a team:

- Discover areas of strength and weakness.
- Organize a budget.
- Understand the impact of their program.
- Explain the benefits of a partnership with a Sponsor.

The Fundraising Plan Overview is a first step towards completing a full team business plan. With additional information about the team, the structure, and future plans, a full business plan can be created.

Use this Toolkit as needed

When working on the Fundraising Plan Overview, keep in mind that all teams are unique and there are many different ways to create a fundraising plan to reflect their culture, goals, and needs. Teams can use this document as a guide or tool, and may add or subtract the parts they need to organize their fundraising efforts. The document is not all encompassing, but is meant to provide teams with a starting point to raise their own funds. The examples used in the document come from 2012 and 2013 *FIRST®* Robotics Competition (FRC®) Regional Entrepreneurship Award winning teams and feature mature and organized teams.

The sections in the Fundraising Plan Overview include:

Section	Page Number
Team & Program Overview	3
SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis	4
Team Impact/Outreach	5
Team Budget	6 - 8
Sponsor Benefits	9
Team Fundraising Opportunities	10 – 11
Final Statement	12
Team Contact Info	13

Key-code to explain the colors of the Example Boxes:

- Information that can be included in the Chairman's Award: **Purple**
- Examples from Entrepreneurship Award Winning Teams: **Blue**
- Example of Formatting for a section: **Green**

(Front Cover)

(Team Name)
(*FIRST®* Team Number, High School)
Fundraising Plan

(Include a Team Picture & Personalize the Page)

Team & Program Summary:

The team and program summary should contain a short paragraph about how the team was started, some basic history, the number of students and Mentors currently on the team, and names of the schools (if the students come from different schools). There should also be a short paragraph that explains what the *FIRST* program is.

Example Team Summary:

"*FIRST* Team 68 was founded in 1998 by Tom Stevens, former Global Chief Technology Officer of General Motors (GM). Initially known as Truck Town Terror, the team began with 20 members from schools across Oakland County and was housed at a General Motors facility in Pontiac, Michigan. At that time, there were only seven mentors, all of whom were either GM employees or parents of team members. However, the terrorist attacks of 9/11 led the team to change its name to Truck Town Thunder (T3) in 2001. In 2009, the team relocated to Brandon High School, which remains its current home.

Today, the team consists of 27 student members and a total of 31 Mentors. Members are students at Brandon and Holly High Schools and Mentors now include GM engineers, parents, college students, Alumni, and partner representatives. Nine of these Mentors are considered 'advisory Mentors' because they are responsible for creating and enforcing rules and regulations, team policies, and are also responsible for the overall team organization."

–FRC Team 68, Truck Town Thunder

Example Program Summary:

"*FIRST* was founded in 1989 to inspire young people's interest and participation in science and technology. *FIRST* designs accessible, innovative programs that motivate young people to pursue education and career opportunities in science, technology, engineering, and math, while building self-confidence, knowledge, and life skills."

– FRC Team 4403, ROULT

The mission of *FIRST* is to inspire young people to be science and technology leaders, by engaging them in exciting Mentor-based programs that build science, engineering and technology skills, that inspire innovation, and that foster well-rounded life capabilities including self-confidence, communication, and leadership.
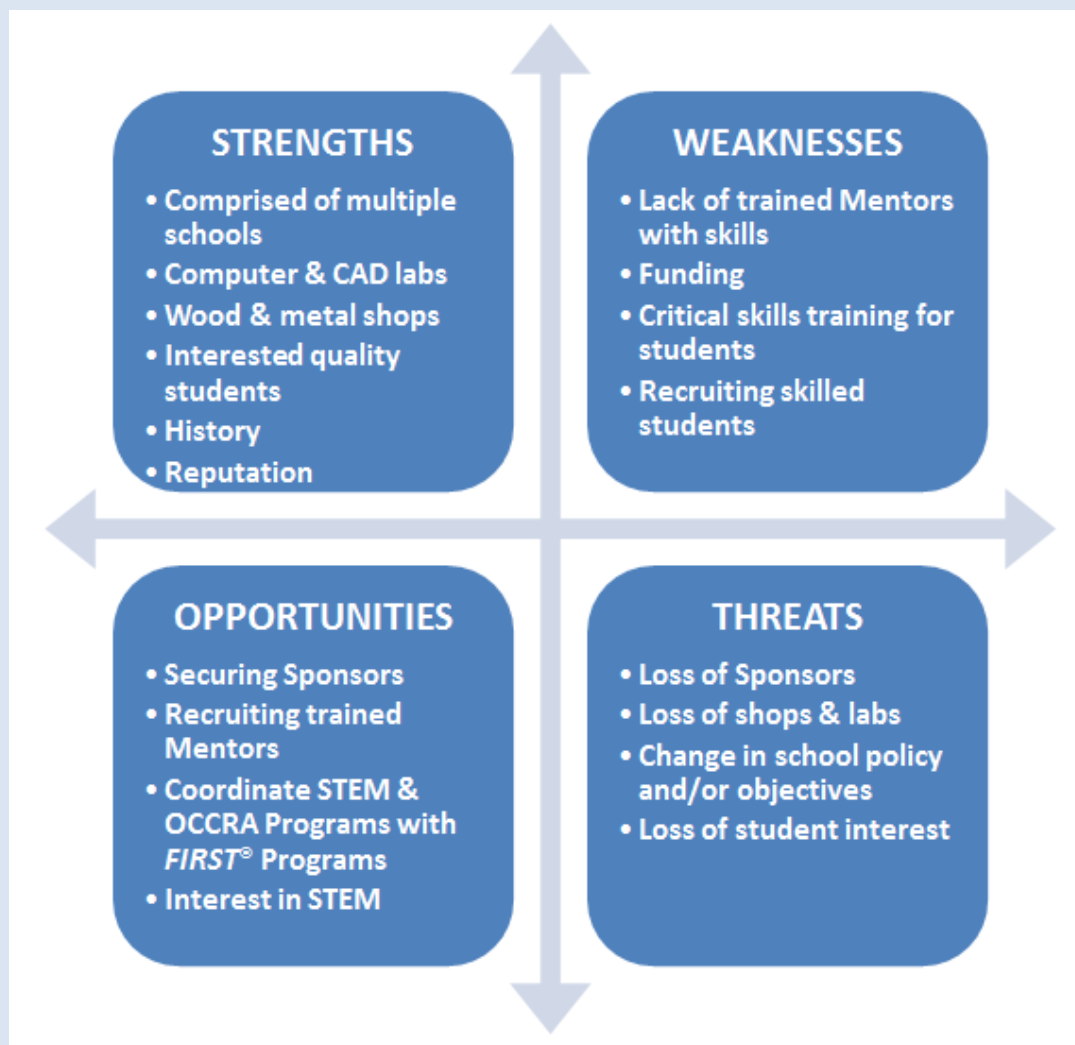
–*FIRST*® website (www.usfirst.org)

As a *FIRST* team, it is important to identify the areas a team has built up successfully and what areas need work. Reviewing the **Strengths, Weaknesses, Opportunities,** and **Threats** in a SWOT Analysis is the first step to knowing what type of sponsorships or fundraising a team has to do. Once a team analyzes their situation they can build on their strengths, correct weaknesses, pursue opportunities, and avoid threats.

Example SWOT Analysis:

"The SWOT Analysis was used to evaluable the **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats to *FIRST* Team 68 Truck Town Thunder's organization. The strengths and weaknesses refer to internal factors of the team. The opportunities and threats refer to external factors the team may encounter."

STRENGTHS
- Comprised of multiple schools
- Computer & CAD labs
- Wood & metal shops
- Interested quality students
- History
- Reputation

WEAKNESSES
- Lack of trained Mentors with skills
- Funding
- Critical skills training for students
- Recruiting skilled students

OPPORTUNITIES
- Securing Sponsors
- Recruiting trained Mentors
- Coordinate STEM & OCCRA Programs with *FIRST*® Programs
- Interest in STEM

THREATS
- Loss of Sponsors
- Loss of shops & labs
- Change in school policy and/or objectives
- Loss of student interest

–**FRC Team 68, Truck Town Thunder**

TEAM IMPACT/OUTREACH

The Team Impact/Outreach section of the business plan focuses on how a team has impacted or helped the local, state, national, or international community. STEM outreach is a key component in *FIRST* culture and is part of a *FIRST* teams' identity. In addition to explaining outreach the team has done, it would be appropriate to include documentation and graphs on how many people the team is affecting or what careers former students have pursued.

Example Team Impact:

"…Even though ROULT 2012 had made huge advances, the 2013 generation decided to push the stakes higher and devote itself in a full-fledged stand for supporting its community according to the founding vision of *FIRST.* Since the new team's recruitment program finished, multiple events and projects have been made to link the team to its community, near and far. The team members consider themselves lucky to have the opportunity, which has been offered to them, and they consider it pertinent to be humble and give the wealth of knowledge and energy they possess back to the community.

The new team and the old team decided to use the robot designed for the REBOUND RUMBLE™ Challenge which participated in the 2012 FRC competition to show it to children from a nearby kindergarten. The children were amazed when they saw the robot. They were also given a succinct presentation detailing in very simple terms the functions and different types of robots, using examples from popular media to which they were familiar. The children were thrilled and involved in the presentation, afterwards the robot threw several shots at the basket while the children cheered. At the end of the day they had a short meal, and the 2012 and 2013 teams discussed the difficulties which arose during the 2012 competition…."

– FRC Team 4403, ROULT

TEAM BUDGET

Team Income & Expenditure:

Team income contains line items of monetary or in-kind donations a team receives or fundraises, while team expenditure contains line items of the costs a team incurs throughout a year. Teams should include the costs associated with team outreach events in their expenditure costs to tie in the impact of the team to the team budget.

Example Format to Create a Team Budget:

Income:	Cost
Sponsors	$000.00
Team Camps	$000.00
Concessions for FTC Qualifier	$000.00
Other Fundraising	$000.00
Student Fees	$000.00
Total:	**$000.00**

Expenditure:	Cost
FIRST Registration	$000.00
FLL Team Kits	$000.00
Field Pieces	$000.00
Robot Expenses	$000.00
Second Regional	$000.00
Travel Costs	$000.00
Off-Season Event Registration	$000.00
Total:	**$00,000.00**

Additional Opportunities for Support: In-Kind Donations

There are many costs associated with running a *FIRST* team. Listing specific items a team needs can help develop a list of potential Sponsors a team should cultivate. The list can be included in a Sponsor packet to highlight additional team needs beyond monetary donations.

Example Information to include in a list of Needed In-kind Donations:

Items:	Number Needed	Single-Item Cost	Final Cost
FLL Lego Kits for Middle Schools	4	$500	$2,000.00
Team Trailer	1	$3,000	$3,000.00
Bus to Travel to Events	1	$2,000	$2,000.00
Robot Material Cost	2	$4,000	$8,000.00
Large Rolling Tool Box	1	$1,000	$1,000.00
Pit Banners & Sponsor Banners	1	$1,000	$1,000.00
2014 Field Pieces	1	$1,500	$1,500.00
Saturday Build Season Food	6	$200	$1,200.00
		Total:	$19,700.00

Additional Opportunities for Support: Mentors

In addition to in-kind materials a team needs (such as tools, training materials, and kits) teams should identify areas where they could use Mentor support or training. Looking at a list of Mentor roles could encourage a Sponsor to get involved with the team as a Mentor or take a day to help train the team in a specific area.

Example of Mentor Roles:

Mentor Roles	Role Description
CAD	Teach students on the team how to CAD
Marketing	Assist with team marketing and creating a team business plan
Travel Logistics	Organize the team travel to regional events outside of the local area
Prototyping	Assist with the design of the robot and teach the students how to create basic prototypes
Writing	Assist the Marketing and Award Sub-Teams with team award submissions
Electrical	Show students how to wire, organize an electrical board, and update and check the robot
Finance	Help students manage team funds and assist with fundraising
Programming	Work with the students to program the robot for competition
Graphic Design	Create banners, logos, team handouts, and T-shirts for competitions
Public Speaking	Teach the students how to speak in front of potential Sponsors and Judges
Engineering Design	Work with the team to pick a strategy, design a robot, and manage robot creation
Mechanical	Help the students build a robot for competition in March
Social Media	Work with students to set up and manage social media sites
Website	Teach students how to build and manage a website
Project Management	Work with students to set time and performance goals to meet deadlines, etc.

SPONSOR BENEFITS

Identify the different levels of sponsorship the team recognizes and the benefits of each level of sponsorship. This information can be included in the packet of information brought to a Sponsor presentation.

Example Sponsor Benefits:

Degrees of Sponsorship:

Title Sponsor- $15,000 +

- Tournaments: Your company thanked during competition alliance selections nationally televised and paid travel to one chosen tournament
- School Display Case: Logo displayed in showcase
- Robot: Large logo of business
- Team T-shirt: Large logo of business
- Banner: Large logo on own private panel (displayed at events & tournaments)
- Website: Banner & link on sponsorship page & logo on the front page

Platinum Sponsor - $5,000 -$14,999

- School Display Case: Logo displayed in showcase
- Robot: Small logo of business
- Team T-shirt: Medium-sized logo of business
- Banner: Large logo on banner (displayed at events & tournaments)
- Website: Banner & link to Sponsor's website on sponsorship page

Gold Sponsor - $1,000 -$4,999

- Team T-shirt: Name of individual/business in large font
- Banner: Small logo on banner (displayed at events & tournaments)
- Website: Picture & link to Sponsor's website on sponsorship page

Gold Sponsor - $500 -$999

- Team T-shirt: Name of individual/business in medium font
- Banner: Large name on banner (displayed at events & tournaments)
- Website: Picture & link to Sponsor's website on sponsorship page

Silver Sponsor - $100 -$499

- Team T-shirt: Name of individual/business in small font
- Banner: Small name on banner (displayed at events & tournaments)
- Website: Name of individual/business on sponsorship page

Bronze Sponsor - $25-$99+

- Website: Name of individual/business on sponsorship page

Available to Sponsors of $100+

Members of the team will give a complimentary presentation to a small or large group of people providing more information and an optional interactive demonstration with a robot.

All Sponsors should be listed in the "official" tam name which appears in the Program books.

– FRC team 781, Kinetic Knights

The Team Fundraising section of the business plan explains annual team fundraisers and highlights any future fundraisers the team will be pursuing. Information such as the cost of materials, the number of people needed to run the fundraiser, and the net income should be included for each fundraiser.

Current Team Fundraisers:

Example Current Team Fundraisers:

Rogelio Ramos Comedy Show

On November 14th, 2012, the team organized a comedy show featuring a local Torreon comedian, Rogelio Ramos. The team contacted the comedian, who offered a low price for his services in view of the team's purpose. The team set up the show in the school's auditorium. Tickets were sold weeks before the event took place, and the team was responsible for planning of all of the details involving the event. Chips, coffee, cake and soda were sold during the show. In order to communicate the purpose of the show to the audience, a short video demonstrating ROULT's progress was shown at the start of the show. At the end of the show, a plasma T.V. was awarded to a member of the audience selected at random by a draw. After seeing the hard work done by the team, Rogelio promised he would put on a show next year free of charge for the benefit of ROULT. Almost 500 people attended to the show.

– FRC Team 4403, ROULT

Future Team Fundraisers:

Take a look at a few of the unique fundraisers *FIRST* teams have put on in Section 8 of the *FIRST* Fundraising Toolkit (*Link TBD*). Create a list of 5-7 potential fundraising events and activities the team could put on to include in this section of future fundraising events. Teams should keep in mind the outreach events the team takes part in and how these events could develop into a team fundraiser.

Reference the Strengths and Opportunities sections of the team SWOT analysis to determine the best fundraisers the team should start with and organize them in order of easiest fundraisers to more challenging fundraisers for the team.

Suggested Information to Include About Current/Future Fundraisers:

Name of Fundraiser:

Short Description (3-5 sentences):

How the team advertised the event:

Materials Needed (Identify any materials the team is able to have donated):

Total Money Collected:

Total Team Cost for Fundraiser:

Fundraiser Net Income:

Number of Students & Mentors/Parents needed to run the Fundraiser:

(Picture)

Note: In terms of future fundraisers, use estimated numbers to determine the money raised, cost of the fundraiser, and net income.

FIRST

WHY IS YOUR TEAM UNIQUE?

Include a one-sentence explanation as to why your team is unique to wrap up the document.

Consider how the team might give back to a Sponsor who may be viewing this information; i.e., bringing *FIRST* culture to the Company, helping with the Company's community awareness, etc…

TEAM CONTACT INFORMATION

Website:
Team Email:
Facebook:
Twitter:
Other Social Media Sites:

Main Contacts:

Mentor Name:
Title:
Email:
Phone:

Team Meeting Information:

Location:
Dates:
Times:

Sponsorship Information:

Checks should be made payable to: (Correct Team Name)
Donations may be tax deductible; please contact the team for more information.

(Note: Teams should clearly identify how checks have to be addressed so the money goes directly to the team funds. Teams should also know which donations are tax deductible and what information is needed to process the information properly.)

Mailing Address:

(Name Checks should be made payable to)
Attn: (Correct Team Information)
(Address)
(City), (State) (Zip Code)