The Compass Alliance Pathways: Fundraising

An important part of being sustainable year after year is to get enough money to support your team. Fundraising allows your team to develop both technically and as a program by providing sufficient funds to grow and expand your team.

Level 0: Stepping Stones - Establish a Business Plan

All fundraising starts with a business plan. This is absolutely crucial and you should have one completed before you even start to think about fundraising. It should be completed 3-5 months before the season starts. Within a business plan you should:

1. **Set a Budget**

   a. Create a list of all expenses your team will have in the coming year and compile into a spreadsheet
      i. Regular season and off-season Competition expenses (Fees, Travel, Food, Lodging)
      ii. Other team expenses, e.g. Team Apparel, Capital Expenses, Subteam Expenditures, Outreach
   b. Determine a budget for for the year
      i. Make sure this covers all of the items your team will need, including materials, tools and equipment, and anything else
      ii. Should be based on actual prices from identified suppliers
      iii. If your team is divided into subteams, have each subteam determine their own budget
   c. If possible, include a reserve fund to support future capital expenditures and provide a cushion for pre-season expenditures
   d. Be reasonable
      i. Make sure that your fundraising goal is achievable
      ii. Do not waste money on unnecessary items

2. **Set Fundraising Goals**

   After creating a budget, you will know how much you need to raise in the coming year.

   a. Determine how much money is left over from the previous year (if any)
      i. An ongoing plan for carrying over money from year-to-year helps in covering expenses before each fundraising cycle starts
      ii. Include in your budget an allocated fund to carry over to the next year
   b. Establish a goal higher than your expenditures so you do not have *just enough* to make it through the year

  i. Set your target higher than you need so you can make sure you have enough to make it through the year

  ii. "Shoot for the moon and you will land among the stars"

3. Develop a Fundraising Plan

Once you have an income and budget, you need identify sources of income.

a. Great places to start:
  i. [FIRST Grants](#)
  ii. Grants for FIRST teams (E.g. [UTC](#), Qualcomm, [PTC](#))
  iii. Local Service Clubs (E.g. Rotary Club, Lions Club, AAUW)
  iv. Local School District

b. If you are looking for more places for fundraising try:
  i. Creating an event for parents and solicit donations - When parents actually see what teams are doing and the the benefits that your program provides to students, they are more likely to support you and often at a higher level.
  ii. Local/National Grants - Try and focus on grants you know that you qualify for. Generally technical grants are a great place to start, but try and look online for other grants you may qualify for.
  iii. Sponsorships - Companies love to help the community, as it shows they care. Try and focus on local technical businesses or educational institutions, as you already have something in common, but do not be afraid to ask other companies. If you have a personal connection with a company, ask them because they will often be more inclined to donate more.

c. Try to match your efforts to the expected results
  i. Bake Sales, Pasta Feeds, Car Washes, and other community events are great ways to fundraise when starting out or if in an area without many sponsorship opportunities.
  ii. **However,** these are not very sustainable, take a lot of time and effort for a small amount of funding, and can take away from finding some great sponsorship opportunities.

d. Resources for Grant Writing:
  i. [FIRST Grant Webinar](#)

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Venturing Onwards: Put Yourself Out There!

Now that you have created your business plan, it's time to put yourself out there and start raising money! Putting yourself out there with sponsors can be really daunting, but as long as you remember why you love robotics, it can also be really rewarding. Here are some tips to help you start fundraising.

1. **Create a Sponsor Information Booklet**

   a. A Sponsor Information Packet or Booklet is a great item to give to a sponsor to tell them all about you and what they mean to you.
   b. In it you want to include information about why they should sponsor you along with general information about the team.
      i. Goals
      ii. Mission/Vision
      iii. What their money will go to
      iv. What they will receive if they choose to sponsor you
   c. [Team Sponsorship Packet Example Template from FIRST](#)

2. **Work with a Non-Profit**

   a. It is not required, but it is highly recommended you find a non-profit (501(c)(3)) to accept donations to your team.
      i. This makes you more appealing many sponsors since all donations become tax-deductible through a 501(c)(3).
      ii. Gives opportunities for more money through grants. Some grant sources will only fund to a 501(c)(3).
   b. There are many non-profits you will most likely be able to work with.
      i. *Schools* - Schools often have non-profits for sports teams to accept donations, and most are willing to serve as a partner in fundraising and managing donations.
      ii. *Other local FIRST teams with a 501(c)(3)* - Many teams are willing to help out if you need it, so do not be afraid to ask teams in your area if you can work with their non-profit organization.
      iii. *Other Local Non-Profit Organizations* - There may be other educational, STEM-related, or community groups that have non-profit status and may be willing to work with you to accept donations and make them available to your team.

3. **Apply For Grants**

   Grants can be a great way to support your team, and are offered from a variety of sources to fund teams that meet their criteria.

a. Start Early! Many grants are due in August or September. Begin researching grants throughout the competition season and make a list of the deadlines for the grants you are interested in applying for.

b. Make Sure You Fit the Grant Guidelines and Requirements
   i. Many grants have very specific guidelines and requirements. If you do not fit, you will not receive the grant, so try and focus on ones you know you will qualify for.
   ii. There are a number of grants available specifically for FRC teams. Check out the list on the FIRST website and other grant information on the FIRST website. If you have a local FIRST partner in your area, check in with them for grant assistance as well.
   iii. Research other grant opportunities for STEM activities, robotics teams, and educational activities online. Many grant opportunities are also available through companies that have an employee involved with the team as a parent or mentor.

c. Proofread Your Work
   i. Most grants have applications in which you write a few paragraphs on why your team deserves the grant, so make sure those have been proofread many times so your points are clear and concise.
   ii. When writing for grants, use the text you've already developed for previously completed award submissions or other team promotional materials. You may already have the information you need to highlight the accomplishments and uniqueness of your team (more on award submissions here)

4. **Parent Support**

   Parents can be one your team's biggest financial supporters, not only through direct donations, but also by helping identify sponsors in the community, and getting grants or sponsorships through their workplace.

   a. Parents love robotics and love your program, so don't be afraid to ask for them to help support your team with a donation.
   b. Hold a Parent Information Night or form a Parent Booster Club
      i. This is a great way to get parents involved with the team which will make them more inclined to join.
      ii. Offer up pledge forms for parents who want to support your team and what you stand for.
      iii. More information on parent booster clubs here
   c. Many parents can contribute to the team through a workplace donation matching program that will match their contribution to the team, or their

company may have grants or sponsorships available for programs that students of employees are involved in.

d. Parents may also know of companies or organizations in your area that could be potential sponsors, and they may have personal connections to help make contacts with those companies.

5. Sponsorships

Sponsorships are really a two-way street: the support sponsors provide is a big benefit to your team, but it also helps them be seen as a contributor to activities in their community that are in line with their own goals. Be sure that when you communicate with sponsors, they understand how their goals and yours align, and how a sponsorship benefits you both. You want your sponsors to feel that they are a real partner with your team and a contributor to your success, both in competition and in supporting STEM education for students. Your team has a unique story to tell, and you should communicate that story when you reach out to potential sponsors.

a. Identify Potential Sponsors
   i. Identify companies in your community or area that might be interested in sponsoring your team. Companies involved with STEM related activities are the best prospects since your team members could be their future employees or consumers of their product or service. Look for companies that have similar goals to your team.
   ii. Some potential sponsors may include less obvious choices like realtors, who have an interest in having strong educational opportunities in the community that they can talk about with home buyers.
   iii. Companies that sponsor other teams or activities in your community may not always be a good fit, or may already have too many requests for sponsorships.

b. Involve Your Team
   i. Everyone on your team should be a part of identifying and contacting sponsors. Assign two or more students to each sponsor to be responsible for contacting sponsors, following up on the opportunity, and keeping in touch with sponsors throughout the season.

c. Contact Potential Sponsors
   i. Identify who you will be contacting. Most of the time, you'll want to send it to your personal contact in the company, the CEO/owner of the company, or (if they have one) a Sponsorship Organizer.
   ii. Include all necessary information: your name, your team name, what is FIRST, how long has your team been around, what your team does, what your team believes in, why this sponsor should sponsor you, and an explanation of what they will receive in return.

1. Some of this can be in your Sponsorship Information packet. You **should not** rehash your Packet and send it to your sponsor in an email.

iii. Keep your message short and to the point. A long, complicated email message won't get read.

iv. Attach a PDF of your Sponsorship Information Packet.

v. Be extremely professional. Remember, professional does not necessarily mean stuffy and boring, but it does mean polite, well-worded, and gracious. Address your contact with "Ms." or "Mr.", sign off with your name, your team, and your position (if you have one), and check for grammar, spelling, punctuation, and clarity multiple times.

vi. If they do not respond, write a follow-up email using the above guidelines, as they might have missed it.

d. Follow-Up with a Personal Phone Call

i. This can be stressful, but is extremely important in pulling in sponsors to your program.

ii. Stay professional throughout the entire call, using a similar tone to your email.

iii. Unless they ask for detail, keep things short . It can be difficult to remember a lot of information when you've only heard it once, so be brief. If they want more detail, feel free to talk more about your team, but also offer to email them more information

iv. If they do not pick up, state your name, team name, a brief mention of who you are and what you want (e.g., "a high school robotics team calling in regards to a possible sponsorsorship with your company"), and list your contact information twice.

e. Make a Presentation

i. Offer to bring your robot for a presentation at the sponsor's business, or to give a presentation to the company's decision makers about the team and FIRST robotics, including a robot demonstration. Once they see what you are doing, and hear from your team members, they are often more inclined to be a sponsor.

f. Maintain a Relationship Throughout the Year

i. Engage with them on social media.

ii. Send team newsletters to keep them updated about your build season and competition season progress. This is an easy way for a company to stay connected and they can easily distribute the newsletter to their entire employee base.

iii. Schedule Robot Demos for Your Sponsors

1. Robot reveal before bag and tag

2. Take Your Child to Work Day

6. One-Time Fundraisers

These types of fundraisers can help build a team's profile in the community, but they can take a lot of time and effort for not a lot of financial results. Before proceeding with these fundraisers, be aware of how much effort you will spend for the return you expect. If you will be putting in a lot of time and effort into a program that won't yield significant results, it might be better to focus your efforts on gaining new sponsors.

 a. Bake Sales
  i. Bake sales are super fun and great for getting your name out there
  ii. Make sure you have enough time to plan and bake for the sale
  iii. Great way to get families/parents involved
  iv. Can be a part of other school or community events
 b. Apparel Sales
  i. Consider an online store to sell team apparel
   1. Bonfirefunds
   2. Custom Ink
 c. Pasta Dinners
  i. Holding a Pasta Feed is an awesome way to connect to your community
  ii. Make sure you have enough time and money to make the food for your guests
  iii. Another great way to get parents involved in fundraising
 d. Crowdfunding
  i. Sites such as GoFundMe, DonorsChoose, Razoo, and many others offer a platform to raise money for your team or for specific projects (such as a purchasing a 3D printer, supporting a trip to Champs, or providing scholarships for individual students)
  ii. Make sure you really spread the word - you can ask other local teams or well-known organizations in the area to post about it on their social media platforms and/or put flyers up advertising your funding campaign.
  iii. These are a relatively low effort activity that can yield a good return.

Forging New Paths: Plan For the Future

Here are some additional ways you can enhance your fundraising activities. These are larger ideas that take some long term planning, but can have lasting positive effects for your team.

1. Develop a Media Strategy
 a. Get your team name out in the community so that everyone knows about your team and what you do.
 b. Make presentations to community and business organizations, like Rotary or the Chamber of Commerce, to help connect you to potential sponsors.

    c. Establish a relationship with your local newspaper to get regular articles about your team in the paper. In every article, be sure to acknowledge your major sponsors.

    d. Use your social media to promote your team activities and to highlight your sponsors. Thanking your sponsors on social media can be a great way for them to get more recognition and expand your outreach through their social media platforms.

2. Create a Non-Profit Organization for Your Team

    a. Learn about the benefits and process of becoming a 501(c)(3) on the FIRST website here.

    b. Creating a non-profit allows your team to provide tax benefits to your donors, and allows more control over your own funds.

    c. The process of establishing a registered 501(c)(3) non-profit organization can take from 6 to 12 months to complete, and involves filling out a number of forms for state and federal agencies.

    d. Resources for establishing a non-profit can include meeting with other non-profits in your area to see what they did and to get examples of things like their bylaws and policies, meeting with local legal or accounting professionals that may be willing to donate time to helping out, or the *How to Form a Nonprofit Corporation* guide by Nolo Press.

    e. A team non-profit will also take a substantial commitment from team parents or other adults in the community to help run and sustain the organization, including annual tax reporting.

3. Create Long-Term Sponsor Partnerships

    a. You can go beyond yearly sponsorships with companies and create a long-term, multi-year partnership.

    b. Work with companies that are willing to make a significant investment in your team and create an agreement to sponsor the team for 3 to 5 years at a time. This type of sponsorship can be supported by a unique type of recognition, like their name on your shop, your trailer, or on an outreach program.

       i. Consider incorporating a company's product into your team's FIRST experience where applicable. Use their product on your robot or incorporate it into the shop, if possible.

    c. Multi-year sponsorships help provide funding stability by knowing that you have a guaranteed source of income from year to year.

4. Fundraise for Outreach Programs and Other Teams

    a. In addition to supporting your own team expenses, consider fundraising for special outreach programs or to support other teams in your region. If your team has the resources to raise additional money, there may be teams that could benefit from your experience and expertise.

    b. Sponsors may be interested in funding a special program, like robotics classes for elementary school students. Be sure to make it clear to sponsors that their

donation will be supporting this particular program, and that they will have the chance to be associated with it.

More Ideas

FIRST provides a comprehensive overview of all steps in the fundraising process, along with videos, presentation summaries, and examples of what other teams have done. Check it out [here](#)!

Appendix A - Revision History

Revision #	Revision Date	Revision Notes
1.0	Dec. 2017	Initial Release
2.0	Sept. 2018	Updated formatting Added revision history table