

THE GUIDE TO

Fundraising



Nerd Herd
Team 687
camsROBOTICS



WELCOME TO THE NERDHERD 687'S

GUIDE TO FUNDRAISING

Fundraising is imperative to the success of any FIRST Robotics team. Through many fundraisers, FIRST Robotics Team 687, the Nerd Herd, has fundraised to finance several aspects of the team such as traveling expenses, regional registration, and parts for the robots. The Nerd Herd hosts annual fundraisers to ensure the fiscal stability of the team. One of our most successful fundraisers has consistently been the CAMS Halloween Night, an appropriately themed event that produces a grand profit able to pay for half of one FIRST Robotics Competition (FRC) event. This year, to account for possible decrease in profit, the team introduced its first annual Winter Fest concert fundraiser.

As a result of our success, the Nerd Herd Administration sub-team has published its own “Guide to Fundraising” in order to share our trade secrets and tips while spreading the FIRST message. This guide will assist other FIRST teams with fundraising, whether it’s by hosting events, selling simple food, or targeting companies who are willing to sponsor or generously donate a grant.

Our fundraising strategy has led to several financial home runs. For example, during a VEX Invitational Competition hosted at CAMS, the registration fees – as well as the sales of food and team merchandise, such as T-shirts and HEX Bugs – provided the team with a profit that exceeded \$1,000. At team-hosted events, we consistently make a profit exceeding the \$1,000 mark with: ticket sales, food and drink purchases, and the sale of team merchandise. Despite all these great achievements, the team’s largest monetary gains are attained through grants that are acquired as a result of writing proposals.

Whether you’re a nascent FIRST robotics team or an accomplished FIRST robotics team, we hope this manual will give advice and information that will direct your team to hosting lucrative and profitable events by providing successful step-by-step plans from prior years, as well as propositions to create more profitable events.

Happy Funding!
The Administration Team

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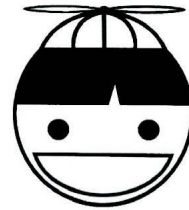
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WRITING THE PROPOSAL



Organization is the most basic principle of any successful fundraiser. Proposals are an important pre-fundraising process that members must complete in order to start a fundraiser. As a team, it is essential that individuals understand how to properly write a proposal. In this section, you will learn all of the following critical aspects of writing a proposal: choosing a proper date for the fundraiser, selecting the venue, estimating the profit margin, attaining permission for the event, and finally generating a shift list for volunteers. With a solid proposal, the team will

Dates

Choosing a date is essential to fundraising. When deciding on a date for a fundraiser, be conscious of what other events are scheduled around that date, supervision, and weather. Do some research and choose a date with a sunny not so windy forecast that will not force the fundraiser to be cancelled in lieu of uncontrollable instances. With all of these precautions in place, planners should still be aware that the weather forecast is unpredictable, so be prepared for anything. Once the date has been chosen, get the date approved by the club sponsor and student council. With their approval, the next step is to decide on the venue.

Venue

A fundraiser must have a venue that can accommodate the estimated number of guests. The venue must provide protection for the attendees and any equipment the event may use in case of a sudden change in weather; therefore, when choosing a venue, choose a location that will ensure the survival of the fundraiser in the worst case scenario. The venue should be easily accessible and provide optimal space for all the guests. Most importantly, the venue should be fundamentally chosen to be conducive to successful fundraising. For example, if the fundraiser is a car wash, it is not advantageous to choose an indoor venue. After deciding the venue, the next step is estimating the profit margin.

Profit Margin

Determining the profit margin is a key component of the proposal because it gives more confidence of success to those in charge of approving fundraising proposals. Profit margin, expressed as a percentage, is a measure of revenue determined by dividing total income by the difference of expected sales after expenses. Calculating the profit margin of a fundraiser is crucial to the creation of the proposal because it can determine whether or not the fundraiser will reap a net gain.

Try your best to remain conservative in your projections, avoiding overshooting your profit. If a profit margin is calculated and the fundraising idea produces little to nothing, then it should be declined. If this is the case, choose a fundraiser that will generate more profitable revenue or make reasonable adjustments to the fundraiser to increase its profitability. Teams should aim to come up with fundraisers that take little time and effort but make considerable profit. At the

very least, the amount of effort put into the fundraiser should be proportional to the profit made. For example, an event that takes over a month of planning should make at least a few hundred dollars. Time is valuable so make sure the final output of the fundraiser is worth the time put into it. The final step in writing this proposal is to attain the proper permission and to generate the shift list.

Permission & Volunteers

PERMISSION

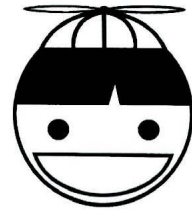
A fundraising proposal must be authorized before it is approved. Get the approval of the team leaders and the supervisors overseeing the event in order to ensure that the proposal is deemed acceptable. In addition to the proposal, if there is any formal paperwork that must be completed by either the supervisors or student council, it is necessary to promptly attend to the documents before submitting the proposal. When everything is set and the proposal is finalized, a volunteer shift list should be comprised.

VOLUNTEERS

A successful fundraiser cannot be successful without volunteers. These integral members of the fundraising team will take care of the equipment at the event and provide services to the guests. Because volunteers can only increase the profit made at the event itself, it is strongly suggested to find local helpers such as, but not limited to: parents, teachers, local businesses, and students. It is also suggested that any volunteers who are willing to donate goods or services are willing to sign a liability form before the event. An example of the NerdHerd liability form can be found in the Appendix.



EVENTS HOSTED



Since every team needs financial support, it is necessary to host several events throughout the year. Everyone has the ability to host a fundraiser, but what sets a robotics team apart from the rest will be the unique route taken to plan and follow through with the event. Think outside of the box and take chances. It is a team effort, so take a look at your resources and put on your thinking caps. Plan away!

Planning

THINKING AHEAD

As mentioned in the previous section, the planning stage is the most important phase in the development of a successful fundraiser. To guarantee a steady profit flow, FIRST robotics teams should hold a meeting at the beginning of each school year solely dedicated to brainstorming ideas for potential fundraisers. After brainstorming, the team must narrow down the fundraising options to a select few. Here are some questions that can help determine which ideas would suit the team best:

- Will this fundraiser bring in a large profit?
- Has this fundraiser been done before? Is it original?
- Is executing the fundraiser going to be difficult?
- Will the target audience be interested?
- Is the fundraiser appropriate? Will it be approved by officials?
- Will this fundraiser help spread the word of FIRST to the community?

After deciding on the fundraisers for the year, organize a calendar of events that marks the start and end of each event as well as the milestones that must be accomplished before the event. This allows for further detailed planning. For this, use the skills from the previous section, *Writing the Proposal*.

COMMITTEES

After the fundraiser has been approved by supervisors and the student council, the team is free to begin preparing for the event. First, elect a fundraising director who will be in charge of organizing and allocating tasks. Next, the director should structure the group into committees according to each individual's strengths. Then, elect a facilitator for each committee who will act as a liaison between the committee and the director of the event. This checks-and-balance system will help eliminate any miscommunication and help ensure that the fundraiser planning is on schedule.

A perfect example of an organized committee is the NerdHerd's annual Halloween Night Committee. Halloween Night is a fundraiser that includes a themed maze, food, music, games, and movies. The Nerd Herd splits this event with several aspects into the following committees: Publicity, Movies and Video Games, Food, and Maze and Attractions. Refer to *The Guide to Halloween Night* for a more detailed summary of the event.

BUDGET

Before you can even think about purchasing anything necessary for the fundraiser, establish a budget. Each committee should decide upon a budget, which the director and facilitators should discuss and eventually approve for the sake of progress. The director and facilitator must prioritize components of the fundraiser in order to help decide where money should be allocated.

RESOURCES

Brainstorm on what resources will be needed to follow through with the event. What needs to be purchased? What can be donated? Are volunteers needed? Each committee should brainstorm for the different aspects of the event. Finally, the facilitators should meet with the director to determine what can be donated and what needs to be purchased.

With an approved budget, members can start gathering the materials necessary for the fundraiser. This stage should be dealt with long before the fundraiser. If you are borrowing any type of equipment from another student or adult, remember to have the lender sign a liability contract. To see an example of a liability contract, see the Appendix.

ADVERTISEMENT

Without appropriate promotion, the target audience will not be reached and therefore will not attend the event. Although your primary purpose is to get people to attend the fundraiser, this is also an excellent opportunity to spread the message of FIRST. Committees should advertise with small flyers, large banners at school, or even consider writing a witty advertisement for the school bulletin. Make use of all plausible advertising outlets to promote the event; the more people aware of the event, the more people can consider attending.

School Fundraisers

Because FIRST robotics teams are busy throughout the school year, it is recommended to only host events that will bring in a significant profit margin. Such events are typically school dances and themed events.

THEMED EVENTS

Human beings naturally enjoy having choices. Therefore, themed events that offer different activities make attendees more receptive to the event. Consider having an event that gives the guests options. Themed events are usually recognized as dances, game nights, or movie nights, but keep in mind that having a mix of activities during the event will give the audience more of an incentive to attend.

As the recession has taken its toll on everyone, the general public is looking for more “bang for their buck.” It is convenient to only pay one entrance fee rather than multiple, separate fees. For example, one may prefer going to a theme park rather than a carnival because he/she only needs to pay an admissions fee rather than a ticket for each ride. In addition, with more activities present at the event, guests will be kept occupied and will stay at the event longer, increasing subsequent sales.

Though multidimensional events require much more work and dedication, the effect on profit is well worth the time. If a robotics team has time to spare and is in need of cash, a themed event may be just what is needed. For an example of a multidimensional event, see *The Guide to Halloween Night*.

SCHOOL DANCES

If looking for a quick and affordable fundraiser, school dances are the way to go. School dances are very successful as they attract a large demographic of people. In addition, not much planning is necessary to hold a school dance; the only challenge of holding a school dance is incorporating the message of FIRST into the event. To do so, consider a FIRST robotics themed dance. A proposal that was considered for a NerdHerd fundraiser was the “Bot Bop.”

After deciding on a theme, consider the price of admission. Generally, the NerdHerd sets up a “Presale” and “At-the-Door” price to help pressure the audience to attend. Deciding when and where to hold the dance should come next. Then, decide on the food and drinks, music, and forms of advertising to be used. Be creative and consider different mediums of promotion. Finally, gather volunteers who are willing to work and create a shift list.

MOVIE NIGHTS

One of the NerdHerd’s most lucrative fundraiser is movie nights. This event requires professional communication skills, a well written proposal, and careful planning. Although it is a very detailed fundraiser, the movie night, if executed correctly, can produce more than \$1000 in profit.

Contact the manager of a local theater and propose the idea. If they are busy, offer to arrange a meeting for a more formal presentation. Effectively communicate the idea of renting the theater for a charitable price a day after the release of a new movie. Compromise on what percentage of the profit will be given to the team and the theater. Once the owner has been persuasively convinced to fulfill their part, decide on a date. Next, arrange how the tickets will be sold. This will differ among theaters. Finally, present the idea of selling private food at the theater. The owner may be hesitant because this cuts from his/her food sales, therefore do not

pressure this idea and be considerate. To close the meeting, have a prepared contract that states that the owner agrees to the terms and conditions to make the fundraiser official. After weeks of planning, contact the manager for final updates and preparations.

After all agreements have been made, return to the robotics team and consider how to spread the message of FIRST for the fundraiser. During the off season of the NerdHerd's summer of 2009, the NerdHerd rented out a local theater that showed Transformers 2: Revenge of the Fallen a day after its release. We also had a midnight showing of Harry Potter the Deathly Hallows Part 2 in the summer of 2011. Although the correlation between the movie and the team is quite blunt, the NerdHerd considered that the theme of robots could create curiosity of FIRST within the crowd. One recently suggested idea is to ask the owner to allow the team to show a commercial of FIRST before the previews of the movie.

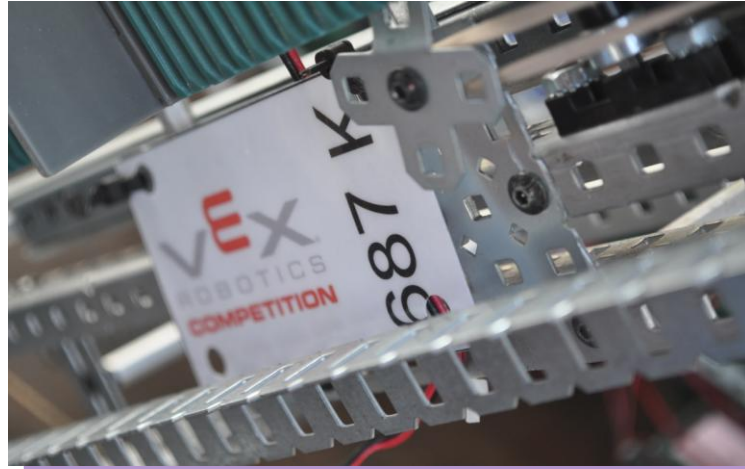
The most emphasized tip the NerdHerd can give is to be creative. Tackle a fundraiser with the intention of spreading the word of FIRST. Anyone can fundraise, but it takes a team to produce a meaningful fundraiser.

Tips and Tricks

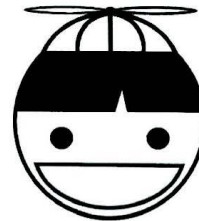
Here are some things to take into consideration when planning a fundraising event:

- Make sure that the date of your fundraiser doesn't conflict with other events planned at your school.
- It is important to keep tickets at a reasonable price. You don't want to discourage your potential audience from attending the event because of overpriced tickets. Know who your audience is.
- Allow enough time to prepare for the event in advance. It is a beneficial idea to begin working on your fundraiser at least two months in advance. This way, you won't be rushed to finish and you will have enough time to make any last minute adjustments in order to produce a well thought out, and quality event.
- It is best to split the members working on the fundraiser into sub-teams, each of which will be responsible for a certain section of the event.
- Make sure to have all materials needed ready at least one week before the event (ex: fog machine, strobe lights, DJ equipment, decorations, utensils, etc.).
- Though planning a fundraiser may seem stressful at times, remember to stop and breathe. Planning should be enjoyable and those who helped plan it should join in on the fun the day of the event.

VEX



INVITATIONALS



The VEX Invitational is a series of competitions hosted by a FIRST robotics team targeting both middle school and high school students. Near the end of the event, award ceremonies are held to announce which teams have qualified for attendance at the VEX World Competition. Hosting a VEX Invitational allows a team to profit from registration fees, sales from team merchandise, and food. Apart from fundraising, however, VEX invitationals give high school FIRST robotics teams the opportunity to help mentor middle school teams.

Planning

As a FIRST robotics team, a VEX invitational competition can be hosted where the hosting team charges the VEX teams for registration. Before doing so, the hosting team must register on RobotEvents.com to post the event for other teams to register. After doing so, find a venue to hold the competition – a familiar surrounding, such as a school, would be appropriate. Hold a meeting with the robotics team to discuss mandatory participation in the event and create a shift list. The next step should be to organize an event schedule for the day (see Appendix for an example). From prior experience, no matter how prepared the host may be for a VEX Invitational, problems will always arise the day of the competition.

Before the event, it is helpful to locate all equipment necessary for the competition to run smoothly. A few obvious essentials include: the VEX game elements, a table for every team that registered, microphones, and chairs. A few optional items, which are highly suggested, include:

- A sound system to play music throughout the competition and to make announcements
- A video camera to broadcast the current match in order to reduce clutter around the players.
- Robot First-Aid team that will assist struggling teams in reprogramming, lending materials, etc.
- A practice area for patient teams
- Signs that indicate the location of restrooms, pit area, registration table, First-Aid team, etc.

Volunteers

The Nerd Herd is organized into two sub-teams: Administration and Build. The Build sub-team is trained to analytically design and construct robots, while the Administration sub-team handles the finances, paperwork, and documents needed for the team. The division of the team is simple, yet very stable. Without the Administration sub-team, the Build sub-team would not be able to function, and vice versa. Everyone relies on one another as a team to tackle problems. For further information about the NerdHerd's team structure, see The Business Plan. In regards to the VEX invitational events, the two sub-teams should work on different tasks to develop an organized competition.

ADMINISTRATION

Before the actual event, the Administration sub-team must first prepare by sending out a packet of liability forms, parking passes, and lunch forms to each registered team. The media sub-team of the Administration sub-team should create certificates and order trophies for the following awards: Design, Amaze, Build, Create, Think, Excellence, and Tournament Champion.

On the day of the competition, the registered teams should arrive with all forms completed and will check in at the registration table where Administration members will review all forms and collect money for lunch. Extra members will be on standby to direct and assist teams to their work station.

After checking in all of the registered team, the team hosting the event will then place the lunch order for pick up roughly 30 minutes prior to the lunch break. Have a parent volunteer pick up the lunch and generic-brand drinks at a local supermarket. In addition to lunch order, Administration has the opportunity to sell snacks and drinks without the concern of health regulation laws to increase profit. For a more detailed instruction of lunch, see the Victuals section of The Guide to Fundraising.

If at any time during the competition Build needs assistance, Administration members are allowed to wander from their job to help. A few commonly open jobs include field reset, queuing, chaperoning a pit room, communicating what match is next, crystal control, collecting and distributing crystals for VEX controllers, acting as referees, or judging a team that may qualify for a special award.

BUILD

The planning stage is fairly simple for Build members since they are working on their own VEX robots concurrently. Therefore, the only prep-work required of Build is retrieving all equipment and reorganizing the rooms that will hold the competition.

The day before the event, members on both sub-teams will help set up for the event. On the day of the event, all members, including Administration, are required to arrive at the venue early to help set up for the competition. During this time, Build members can be seen building and arranging the field, tables, and Robot First-Aid station.

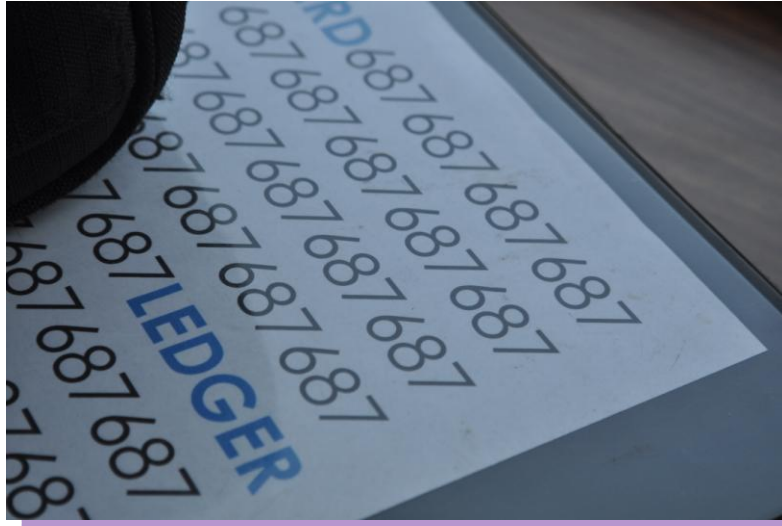
After checking in with the registration and inspection tables, Build will evaluate whether the robot fits all of the constraints. When inspecting a robot, one should make sure that the robot meets size constraints, has properly tightened screws, has no loose cables, is working, has the correct bumper, and is entirely made of VEX parts.

If the robot fails one of the constraints, Build members will assist the team with any problems or complications. Build members at the Robot First-Aid station can provide tools, services, and advice. Once the competition begins, Build members should be occupied assisting the teams, serving as judges, queuing, and updating team matches.

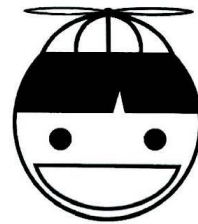
TEAM ADVISORS AND ADULT VOLUNTEERS

Team advisors should assist Build if there are any questions that he/she cannot answer. Also acting as a chaperone, team advisors should keep track of the safety of the teams.

Adult volunteers and parents can help with breakfast and lunch services. Volunteers will ensure there is no misbehavior during the competition.



VICTUALS



Victuals are essential for fundraising. They can be sold anytime you are holding an event with numerous attendees, such as themed events, summer camps, and invitationals. There are several people at these events and in order to keep them satisfied, food must be provided. It is an adequate method of making a profit and satisfying everyone.

Planning

When planning a food sale there are various factors one must take into consideration, such as:

- reviewing possible restaurants
- determining profit margin
- having a variety of food
- recruiting volunteers
- dealing with distribution of meals

The location is an important aspect because it determines where one will set up the distribution area and could also affect the preservation of the food. The profit margin is an imperative aspect of fundraising, the reason being that teams should only focus on selling products that will bring in a large profit. The first step in calculating the profit margin is determining the meal expenses which will help you in formulating a reasonable price for the meal. Once the number of guests is known, one must calculate the projected income and immediately deduct the expenses from it. Variety is essential to the success of sales, as it will appeal to a broader audience.

Paperwork and Food Organization

When all the details are in order, one must ask the team's advisor and student council for approval in selling food. Once consent is given, volunteers must be gathered with a minimum of one adult volunteer. Adult volunteers are needed to procure the provisions and handle dangerous utensils. Other volunteers are required to help serve the food. After the volunteers are obtained, one should create a shift list if necessary. A shift list is needed when the event is going to be a few hours long for fundraisers, such as themed events. The shifts can be 30 minutes to an hour long. Be sure to divide the time evenly amongst the volunteers.

To determine the amount of people needed, one must know what is going to be served. For example, if Mexican food was being served, there would be three volunteers per time slot: one serving enchiladas, another serving burritos, and a third serving the side dish. One person should not be managing the food facility the entire time. In addition, make sure any utensils needed are present for the food distribution beforehand. Write down the results of the food distribution, even if the attempts are unsuccessful. This way, you can keep track of which companies were approached and which ones are still open.

Advertising

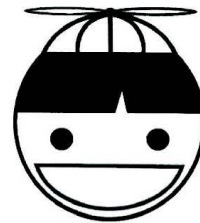
Once everything previously mentioned is complete, advertising begins. Flyers must be created to promote the event and inform guests there will be food for sale. The flyer should include what food is being sold, the price, and the location of the distribution site. It is important to have the details included so the guests know all the information and are not confused.

Once the guests begin to arrive, taking orders in an organized manner is crucial. If the orders are incorrect, guests may become irritated or see the food service at events as unreliable, making them less inclined to come to another fundraiser. The method of acquiring orders depends on the event being hosted. An example of a possible method of selling food is at invitationals. When the different teams start arriving, they have to complete paperwork, which includes an order form with the choices of food. This method ensures that every team has turned in their food order when their paperwork packet is returned. Make sure the order form has all the food choices in an organized manner so it will be easy to tally up the total for each main dish. For instance, if pizza and pasta are being sold, the choices would be on the top of the sheet in columns, there would be a row descending down the left side of the sheet of paper for the guests to write their name and to check off their desired food choice.

TEAM



MERCHANDISE



The selling of accessories, such as team shirts, wristbands, buttons, and other team merchandise, ensures a secure source of revenue. Throughout the school year, the team will be presented with a variety of possibilities in which they can sell their merchandise, such as at Back-to-School Nights, VEX invitationals, etc. This section will detail the conception, creation, and acquisition of these accessories.

Nerd Herd Merchandise

The first step in selling team merchandise is deciding what items to sell. Brainstorm ideas, and remember, creativity is key; so no idea, no matter how radical, should be counted out. Once a list of merchandise has been composed, the team must find ways of acquiring these items.

T-SHIRTS AND ACCESSORIES

Often times, merchandise such as team shirts and buttons, require designs before they are ordered. In such occasions, the team should create various designs and develop a consensus as to which design they like and ultimately will use. Once a rough sketch is developed, proceed to send the sketch to the Administration's media team to create the design on a program for designing (i.e. Photoshop).

If the plan is to have T-shirts or other accessories, hold off on using the logos of your sponsors. Make sure to have the design approved by the company first. If the merchandise has their content without their permission, the team could be sued for copyright infringement. Some companies have constraints as to the position and size of the logo. Next, you must send the design to the team advisor and student council for approval. Once the design is created, an order is placed.

TOYS AND CHARMS

The NerdHerd's distribution of Hex Bugs is very popular among children who visit for summer camps or competitions. Consider looking for cheap toys or trinkets that can target younger consumers. Wristbands and buttons are also favorites among middle school students. In order to target a larger audience and increase sales, a team might consider selling school merchandise, such as lanyards and bumper stickers.

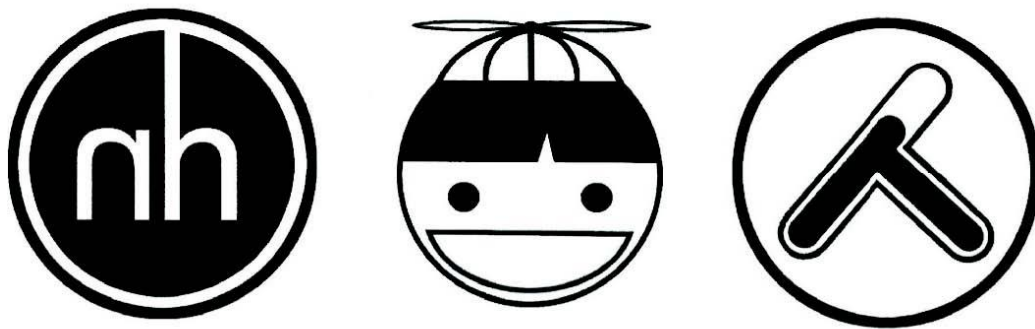
Ordering

When deciding on a vendor, ensure that items can be sold at a reasonable price while still maximizing revenue. Once you have evaluated your options, possibly through the use of a decision matrix, the order can be placed.

When placing an order for merchandise, a purchase order must be made. A purchase order (PO) is a legal contract between the vendor and the team, which states that a check will be sent once the vendor sends the merchandise. First, the school's treasurer must make a PO for the vendor,

using the Robotics account. Once the sponsor – in our case, the vice-principal, and the principal – have signed it off, the PO is turned in to either the school's treasurer or a student council member before their next class meeting. After the PO has been approved by the student council, a team member can get a copy from the school's treasurer or student council and place the order. Next, the invoice should be received from the sponsor or Administration Chair and given to the school's treasurer. They will attach it to the PO and write the check necessary for the payment, which must be approved by the Student Council. Once approved, one can get the check from the school's treasurer or Student Council.

When the merchandise has arrived, it is important to ensure that every item ordered arrived in good condition. Once the condition of the merchandise has been verified, items can be sold.



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