



# Development Update Regional Directors meeting FIRST Championship 22 April 2015

**Jr.FLL**  
Junior FIRST® LEGO® League

**FLL**  
FIRST® LEGO® League

**FTC**  
FIRST® Tech Challenge

**FRC**  
FIRST® Robotics Competition

# **FIRST® is ...**

*Inspiring youth to become science & technology leaders & innovators,*  
by engaging them in exciting, experiential, Mentor- and project-based programs  
that teach science, technology, engineering, and math (STEM) skills, inspire  
innovation, and foster well-rounded life capabilities.

## **Jr.FLL®**

Junior FIRST® LEGO® League

Grades K-3



## **FLL®**

FIRST® LEGO® League

Grades 4-8



## **FTC®**

FIRST® Tech Challenge

Grades 7-12



## **FRC®**

FIRST® Robotics Competition

Grades 9-12



# My Homework from Roseann

- “Region” Sponsorship Levels\*
- Strategic Partners
- Sponsorship Reports

\*”Region” = Geographic area (metro, state(s), country), inclusive of FRC Regions & Districts and ideally all *FIRST* programs in an area

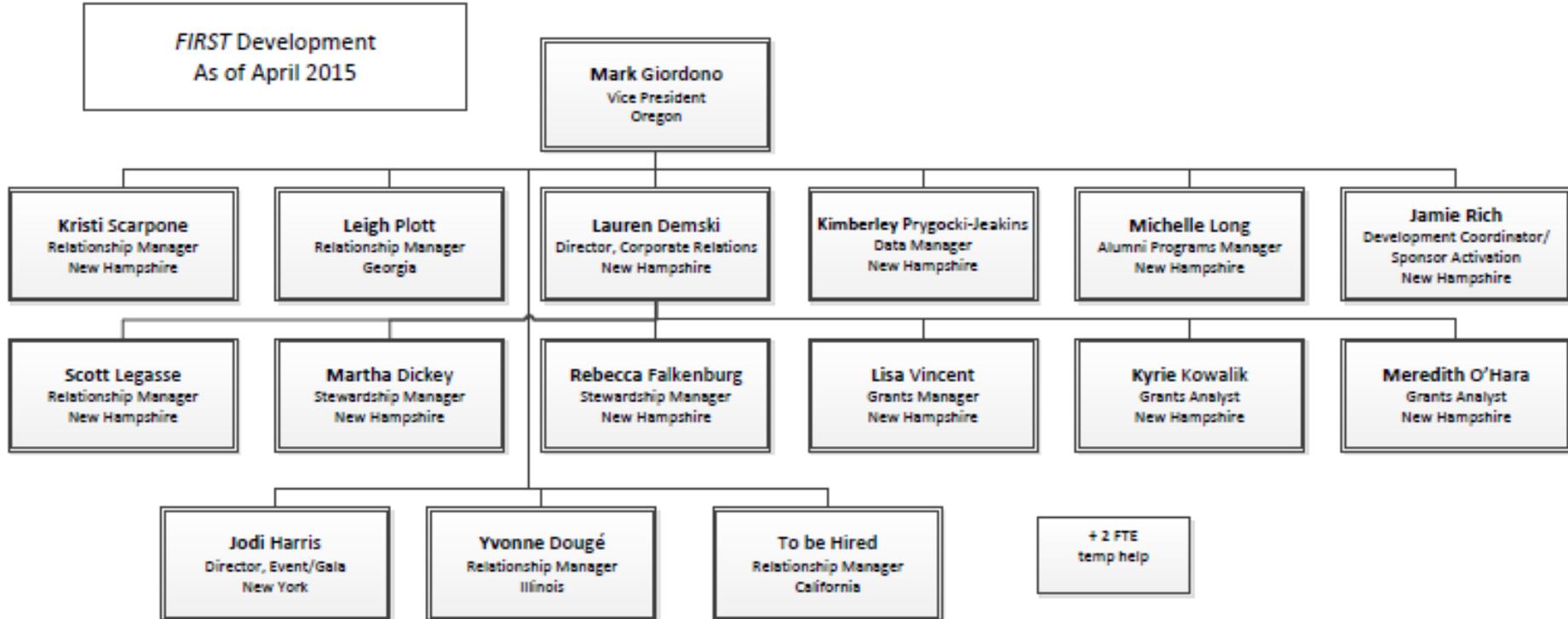


# Development Responsibilities

- Fundraising, Business Development & Stewardship
  - ~\$35m flowing via HQ, effort shared with field, Board & volunteers
  - Approximately 2,000 active or prospective HQ donors
  - Providing resources & best practices for local affiliates and *FIRST* teams to successfully fundraise
- Stewardship via Team Grants
  - Manage application & awards for HQ managed team grants
  - Manage award processes for team grants on behalf of sponsors
  - Approximately \$10m awarded and applied to over 3,000 teams
- Alumni Programs Management
  - Direct overall *FIRST* Alumni Strategy
    - Estimated 700,000 possible *FIRST* Alumni
  - Solicit schools & manage Scholarship Program
    - Approximately \$22m from 180 providers
  - Solicit sponsors and manage Internship Program



# FIRST Development HQ Org Chart



# FRC Region Sponsorship Goals

- Raise money
  - To cover event, RD, recruiting, teams, etc costs
- Raise awareness
- Raise other resources
  - Volunteers, mentors, PR, in kind support
- Support fellow RDs/Regions & overall *FIRST* mission



# Key Strategies

- Matchmaking sponsor needs/wants with *FIRST* assets
  - More on next slide...
- Highlight focus to support of your Region (not just an event)
  - *FIRST* is a year round effort – you should be recognized as such!
  - Sell sponsorship of the Region, not just an event
  - Ability to offer recognition and engagement beyond the Region event(s)
    - To teams, schools, via web & social media, PR, during the whole year
- Emphasize price, not cost
  - Don't sell yourself short! *FIRST* is uniquely valuable
- Keep prices at a high value and consistent globally
  - Reflect the realities but of local conditions, but keep the bar high
  - Key to helping each other out!



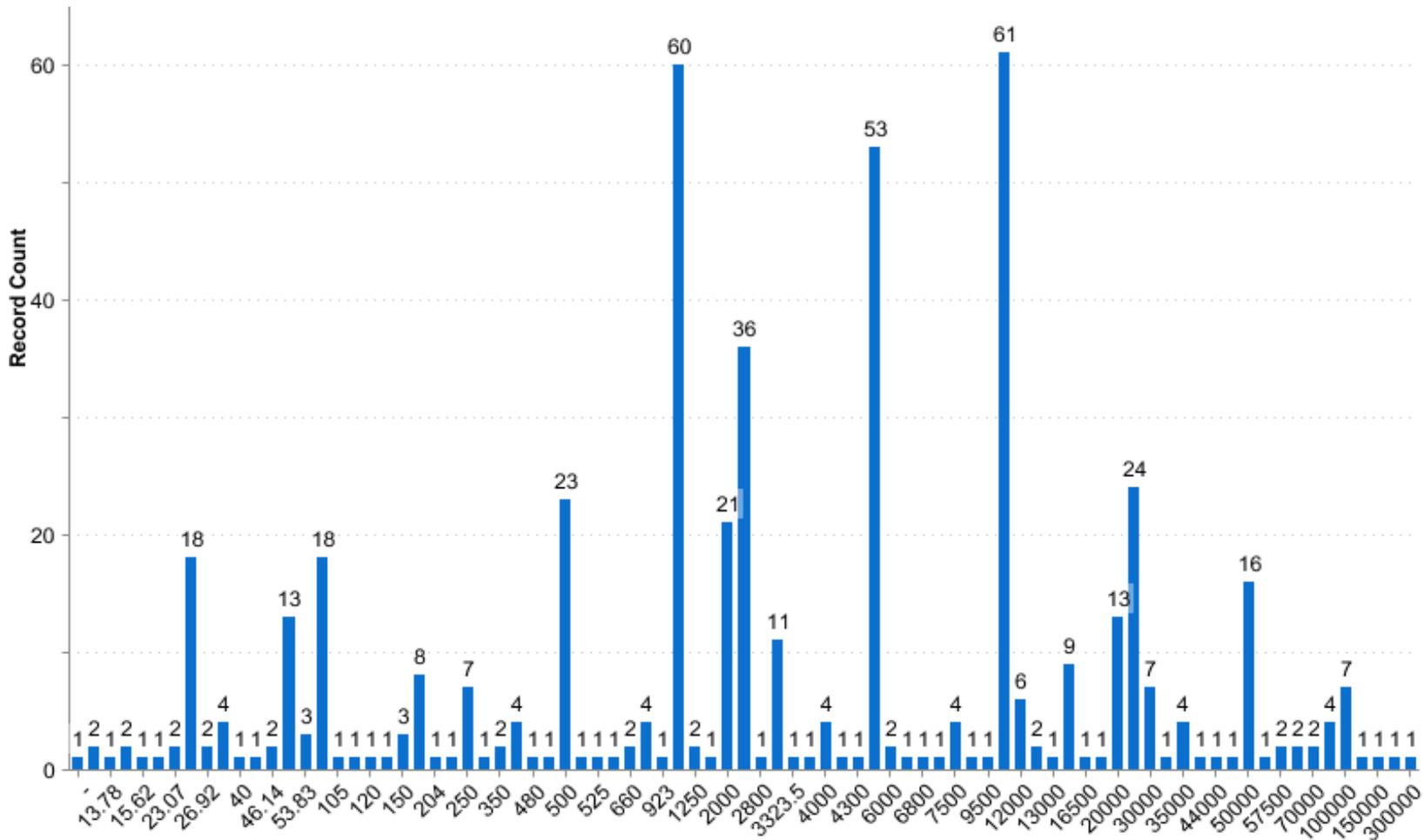
# Begin with what sponsors want

- Understand what sponsors are looking for
  - Don't just share a menu of Region costs
  - Ask what they're interested in first, understand their budget
  - Share options after you know what they want
    - **Customize** based on their interests
- Recognize/value all contributions, regardless of amount
- And don't forget to mention the complete *FIRST* Progression of Programs
  - Gracious Professionalism
  - ...and even if they don't sponsor FRC Region this year, you never know what they can do for you next year..



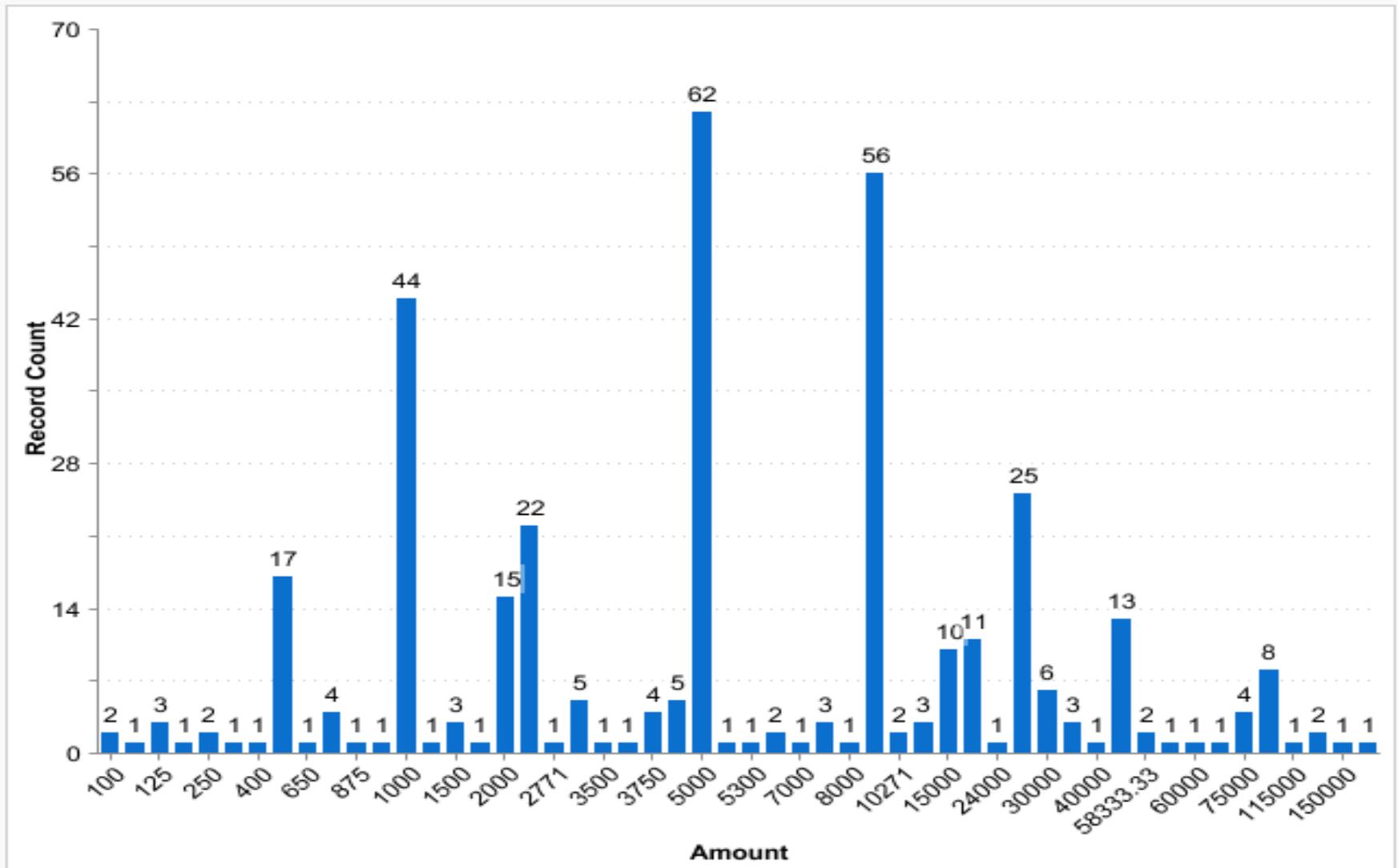
# FY14 Data (as of 1 July 2014)

## Sponsorships at each \$ amount



# FY15 Data (as of 15 April)

## Sponsorships at each \$ amount



# FY15 Data (as of 15 April)

- From \$100 donation to \$200,000 sponsorships
  - Top 10 amounts:
    - \$5,000 (62), \$10,000 (56), \$1,000 (44), \$25,000 (25), \$2,500 (22), \$500 (17), \$2,000 (15), \$50,000 (13), \$20,000 (11), \$15,000 (10)
  - 13 sponsorships \$100k or above (10 in FY15)
    - Totaled \$1,515,000
  - 127 donations \$3k and under
    - Totaled less than \$170,000, but took lots of time
- Raising the bar & investing more time on bigger \$\$ will pay off
  - Does require more customization & support – but that's exactly what HQ staff can help with



# Guidelines for FY16

- Continue to recognize team sponsorship
  - Give some recognition for team only sponsorship (but not to top tiers, that requires cash)
  - Recognition of their support and an incentive to do more
    - Question: Does team support have to be full registration or can in kind or mentoring count?
    - Answer: Use your best judgment – like you do when offering judges role to someone you want to step up to do more
- Fewer tiers with a wider base
  - Sponsorship should look like a triangle/pyramid. Many sponsors at lower levels with less recognition, fewer at top with more recognition
  - Helps guide most efficient use of time and focuses ‘selling’ effort
    - Getting you the most bang for the buck



# DRAFT Guidelines for FY16

A	B	C	D	E	F	G
FRC Region Sponsorship Guidelines FY16, DRAFT April 15						
Opportunity	FRC Region Title Sponsor	FRC Region Lead Sponsor(s)	FRC Region Co-Sponsor(s)	FRC Region Leader in Technology	FRC Region Captain of Innovation	FRC Region Friend of the Future
\$\$\$ Amount of the Region Sponsorship	>\$150,000	\$75,000 to \$149,999	\$40,000 to \$74,999	\$25,000 to \$39,999	\$10,000 to \$24,999	to \$9,999
or Number of Teams 'Substantially' Supported in the Region	n/a	n/a	n/a	20 to 39	10 to 19	5 to 9
"Presented by Company Name" used in all marketing materials and press releases	✓					
Link to Sponsor homepage from FIRST website (via sponsor logo)	✓					
Media Interview Opportunities at the FRC Region Event(s) (select events)	✓	✓	✓			
Meeting/Conference Room provided (select events)	✓	✓				
Opportunity to serve as guest Master of Ceremonies (MC) for appropriate elements of FRC Event(s)	✓	✓				
Introduction & Speaking opportunity at associated VIP Event (select events)	✓	✓	✓			
Speaking Opportunity at FRC Region Event	✓	✓	✓			
Mention of Sponsor by name during event(s) by the Master of Ceremonies	✓	✓	✓	✓		
Opportunity to provide a video to be shown at Sponsored FRC Event (select events)	✓	✓	✓	✓		
Opportunity for qualified volunteers to participate in FRC Event Judging	✓	✓	✓	✓	✓	
VIP Invitations to the FIRST Kickoff & Founder's Reception in New Hampshire	6	4	2	2		
VIP Invitations to the FIRST Championship	6	4	2	2		



Microsoft Excel Worksheet



Double click to open file

send feedback to [mgjordono@usfirst.org](mailto:mgjordono@usfirst.org)  
we'll update and review again in June



# What do we need to do next?

- Feedback on details
- How to customize locally
  - And what can be offered consistently at all *FIRST* events?
  - Easier to get national support when there's some consistency at local levels
- What supports and materials are needed
- Continue improve HQ & Region coordination
- What else?



# Sponsorship Reports

- We're all raising money
  - How do we get good & consistent data
  - How do we stay in sync
- Common CRM (Salesforce)

# Sponsorship Reports Process

- Regional Directors share Local Sponsorship Opportunities with HQ Development
  - Development to input opportunities into CRM for the regional campaign
  - Development to compare with Finance MIP system
- HQ Development provide Regional Directors with Local Sponsorship Opportunities from National Sponsors in Pipeline
  - Visibility & communications!
  - In process/speculative and closed
- Using a common format, language & expectations



# Sample report (fake \$ and status)

	A	B	C	D	E	F	G
1	Account Name	Giving Record Type	Projected Amount	Stage	Giving Owner	Comments	Close Date
2	Booz Allen Hamilton, Inc.	Sponsorship	\$ 9,999,999	Closed Won	Scott Legasse		12/12/2014
3	City of San Antonio	Sponsorship	\$ 16,848,320	In Discussions	Field Ops		6/30/2015
4	CPS Energy	Sponsorship	\$ 2,039,480	Received	Field Ops		6/30/2015
5	Duke Energy	Sponsorship	\$ 3	Closed Won	Field Ops		1/26/2015
6	Frost Bank	Sponsorship	\$ 134,857	In Discussions	Field Ops		6/30/2015
7	Google Inc.	Sponsorship	\$ 123,412	Closed Lost	Field Ops		2/19/2015
8	Graebel Van Lines	In-Kind Gifts	-	Pledged	Field Ops		6/30/2015
9	Greater Texas Foundation	Sponsorship	\$ 2,562,456	Commitment	Field Ops		6/30/2015
10	GSD&M Idea City	Sponsorship	\$ 23,645	Received	Field Ops		6/30/2015
11	National Instruments Corporation	Sponsorship	\$ 23,452,345	New Lead	Scott Legasse		1/21/2015
12	Navy	Sponsorship	\$ 234,527	In Discussions			6/30/2015
13	Rackspace Hosting	Sponsorship	\$ 234,534	Proposal Submitted	Field Ops		6/30/2015
14	SASTEMIC	Sponsorship	\$ 3,462	Commitment Received	Field Ops		6/30/2015
15	Tesoro	Sponsorship	\$ 23,452	Closed Won (Final Payment)	Field Ops		2/3/2015
	Toyota Motor Engineering &			Closed Won	Field Ops		2/26/2015
				In Discussions	Field Ops		6/30/2015
				Commitment	Field Ops		6/30/2015
				Received	Field Ops		6/30/2015
					Kimberley		

# Salesforce enables rollup & more efficient management ability to help

File Edit View History Bookmarks Tools Help

Dev - FY15 By Account Ma... x Sponsor Video Showcase | ... x inmemoryofjesse x Dashboard: Field Operatio... x +

https://na16.salesforce.com/01Zj00000000NGGI

Search... Search

Mark Giordono Help & Training FIRST CRM

Home Accounts Contacts Opportunities Recurring Donations Scholarships/Internships Campaigns Leads Reports **Dashboards** NPSP Resources +

< Go to Dashboard List

## Field Operations Dashboard

Find a dashboard... Refresh As of April 15, 2015 at 7:10 PM Viewing as Kimberley Prygocki-Jenkins

### FY15 Field Ops Designations: Monthly Reports

Designation: Designation Name	Sum of Amount
Alamo Regional	\$326,250
Arizona Regional	\$124,592
Arkansas Regional	\$341,750
Australia Regional	\$10,000
Bavou Regional	\$199,300
Buckeye Regional	\$242,000
Central Illinois Regional	\$118,000
Central Valley Regional	\$70,750
Chesapeake Regional	\$314,783
Colorado Regional	\$10,000
Dallas Regional	\$277,430
Events	\$193,000
Finger Lakes Regional	\$125,000
FIRST Israel	\$176,639

### Current FY Field Ops Pipeline by Stage

Sum of all projected revenue in the current fiscal year for all cultivation stages

### Current FY Progress Towards Goal

All closed giving records with designations for the current FY

### Current FY Closed Won

Designation: Designation Name	Sum of A
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Chat

# Strategic Partner Criteria

## (not for sharing publicly)

- Minimum of \$500,000 total annual contribution to *FIRST*
- Value of contribution assessed by Development Committee as to its strategic alignment with *FIRST* Board Priorities.
  - Different weightings used for different types of support (minimum weighted value of \$400,000 per year is required)
- Meaningful support for *FIRST* beyond one region or program
- Multi-year commitment or two years of past support or two-year firm pledge going forward
- Approval by the *FIRST* Board of Directors

- as approved at the February 16, 2008 Board meeting

- April 2013 Board meeting authorized Development committee to make changes to Strategic Partner membership



**Likely to be updated in the near future**

FOR INSPIRATION AND RECOGNITION OF SCIENCE AND TECHNOLOGY

# Founding Sponsors

**Baxter**

**Boston  
Scientific**  
Advancing science for life™

**DEKA**

**DELPHI**

**FCA**  
FOUNDATION



**KPCB** | KLEINER  
PERKINS  
CAUFIELD  
BYERS

*Johnson & Johnson*



**MOTOROLA SOLUTIONS  
FOUNDATION**

**xerox** 

Never change. Except...



FOR INSPIRATION AND RECOGNITION OF SCIENCE AND TECHNOLOGY

# **FIRST**® 2014-15 Strategic Partners...



**3M**



**BAE SYSTEMS**  
INSPIRED WORK



**DEKA**



**FedEx**



**Google**



**JCPenney**



**NATIONAL INSTRUMENTS**



**PTC**



**QUALCOMM**



**Rockwell Automation**



**Rockwell Collins**



# Other Questions and Feedback? (edited)

*Q: What is the Alumni: Internship Program?*

A: Like the Alumni: Scholarship Program ([www.usfirst.org/scholarships](http://www.usfirst.org/scholarships)), the Internship Program is a listing of Internships available to *FIRST* Alumni (and sometimes current participants still in high school). [www.usfirst.org/internships](http://www.usfirst.org/internships)  
(If you have sponsors who'd like their opportunity listed there, let us know)

*Q: Are event-based fundraisers (a Gala, a ticketed dinner, etc) appropriate in my area?*

A: It depends, happy to help evaluate. They do work in some areas (Arkansas raises >\$30k?). But take a fair amount of work to pull off well.

*Q: How do we get HQ to not steal local sponsor \$?*

A: Ultimately a matter of trust and honoring donor intent. Optimizing sponsor \$ for the greatest *FIRST* good is always Development team intent. Sharing data/being transparent about opportunities – and knowing that they won't always come through – is a key element. Sponsorship reports are one (but not the only) tool to help do so – two way communication of opportunities. But fundamentally based on trust & communication with HQ Dev staff. If that's not happening, don't hesitate to call Mark (541.619.9548) or Roseann.



# Other Questions and Feedback? (edited)

*Q: How do I get HQ to put a Development person in my backyard?*

A: Happy to evaluate areas where we think that could be of use. We do want Development staff close to sponsors and what's going on in real life, don't always have the best view from Manchester. But we also don't have unlimited resources, so have to staff folks where we can do greatest good for *FIRST* overall.

*Q: How do we reflect local costs/pricing in Sponsorship levels?*

A: We do want to reflect differences in markets – NYC is very different from Oklahoma City. Suggested pricing is stated in ranges to reflect that. Remember that \$ should be based on value/price, not cost. And that keeping prices consistent (high) worldwide helps raise all sponsorship boats.

*Q: How do we address when a potential sponsor says “Just send me your sponsorship levels”?*

A: Want to respect prospects' requests, but always ask more questions ('are you interested in certain recognitions', 'are you working on a certain budget', etc), don't provide answers till you really know what the prospect needs (not just what they say they want).



# Other Questions and Feedback? (edited)

*Q: The “Stages” in the Sponsorship Reports don’t make sense. Can we have more/different ones?*

A: Open to suggestions, but we do need to be consistent across all Regions (nothing is officially Won until paperwork is in hand!).

Current stages are:

- New Lead (an idea, low probability to close)
- In Discussions (actually made contact with prospect, they understand what we offer, still low probability to close)
- Proposal Submitted (actually made an ask (verbal or w/ paperwork), but no answer yet. Congrats on asking!)
- Commitment Received (verbal/email indication of sponsorship amount.)
- Closed Won (Final Paperwork/Email received and Finance/Development notified/Invoice Requested)
- Closed Lost (Officially told no. Should have more of these than “Closed Won” (if not, we’re not asking enough))



# Other Questions and Feedback? (edited)

*Q: How do we account for In-kind support*

A: On the Sponsorship Reports there is an “In-kind” type. Just remember that we can never officially ascribe a \$ value to in-kind, we can only acknowledge receipt of in-kind support (official form in US is IRS form 8283. Can only be signed by Terry or Don..)

*Q: How do we keep track of sponsor recognition? Like Google vs. Google.org?*

A: Really depends on the sponsor, make sure to stay in sync with the appropriate HQ Dev person – sponsors do notice how they’re recognized in obscure seeming ways

*Q: We want to better coordinate with HQ sponsors, can we get a list?*

A: Yes. Updated FY16 list will be available in June, but in the meantime this is FY15 “HQ Dev” aka “National Sponsor” aka “Named accounts” list:



Microsoft Excel  
Worksheet

