

Leverage the Best ROI for Your Auxiliary Programs Portfolio!



Developing the Optimal Auxiliary Portfolio for Your School

- What programs come under your auxiliary programs department umbrella?
- Have your inherited special projects?
- How do you determine where to 'spend' precious resources - time, energy & staff?
- How do you best build innovative portfolios of programs to meet strategic goals?
- What are tools for analyzing existing programs & exploring new initiatives?
- What are best practices for engaging with your target audiences?
- How can you leverage your portfolio for the best ROI?

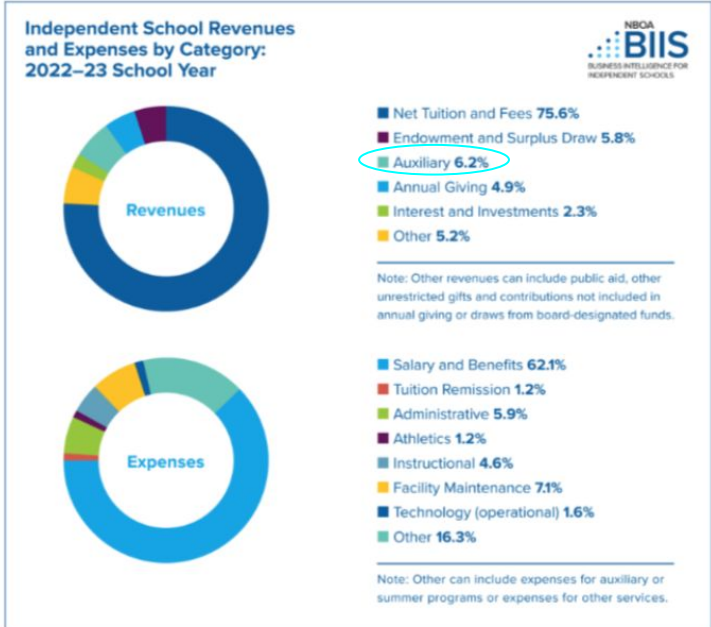
Leverage the Best ROI for Auxiliary Programs Portfolio

Agenda:

- Strategic Priorities
- Inventory of Current Auxiliary Programs
- Current Programs Not under Auxiliary Programs
- Wish List of New Programs / Initiatives
- Building the Auxiliary Buffet - ala carte and overall menu
 - Summer Program Models
 - School Year Program Models
- Define Your Portfolio and Desired ROI / Net Revenue
- Creating Customized Score Card and Boston Matrix
- “Asset / Portfolio” Management - Assessing Leadership Capabilities and Room for Growth

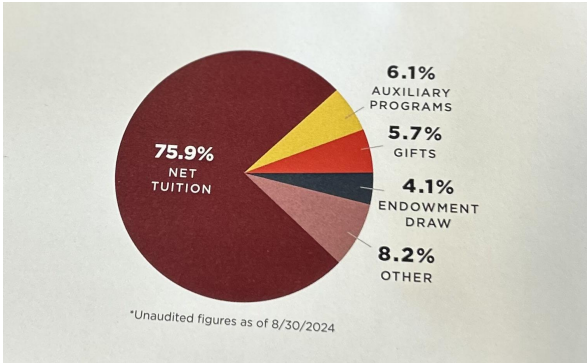
Leverage the Best ROI for Auxiliary Programs Portfolio

Auxiliary is a "living endowment"



On average, Auxiliary is now contributing more than Annual giving or the Endowment Draw. This direction has been a trend for the past few years.

What is your %?



Auxiliary Program Strategic Priorities - Forced Ranking

Distribute a total of 100 points across the following priorities. If a suggested priority does not apply to your school, score it with 0. If additional priorities are not represented on the list, add it under "Other" and assign it a point value. The sum must equal 100 POINTS

Generate additional net operating revenue for the School.

- Offer a range of programs that provide additional net revenue to the annual operating budget of the school.
- Seek partnerships with organizations that increase revenue potential.
- Develop and expand self-operated programs as a means to increase net revenue.

Cultivate admissions applicants for the School.

- Engage youth in high-quality summer experiences on the School's campus that lead them to apply to the School.
- Offer summer and auxiliary opportunities for specific demographics that align with Admissions goals.
- Develop and offer summer programs that reflect the strengths of the School experience.

Provide added value to the School community through additional programs/services.

- Design and offer auxiliary program experiences that serve the needs and interests of current School students and families.
- Develop specialized learning experiences that capitalize on the unique faculty, facilities, and programs of the School.

Strengthen the relationship with the surrounding community.

- Utilize summer and auxiliary programs as a means to engage the surrounding community in positive experiences on the School's campus.
- Seek out and develop partnerships with mission-aligned community organizations.

Advance the School brand as an innovative leader in education.

- Design and offer unique program experiences that differentiate the School from peers.
- Encourage faculty to develop creative program ideas that can be scaled and carried over to the school year program/curriculum.

Enhance the School's DEIJ goals and outcomes.

- Support year round efforts to weave an anti-racist and anti-bias culture of inclusion into the fabric of the community.
- Foster global citizenship and honor a diverse range of experiences.
- Utilize auxiliary program experiences to engage a diverse range of participants and educators.

Other:

100 TOTAL Points

Determine your Why!

What are your
strategic priorities?

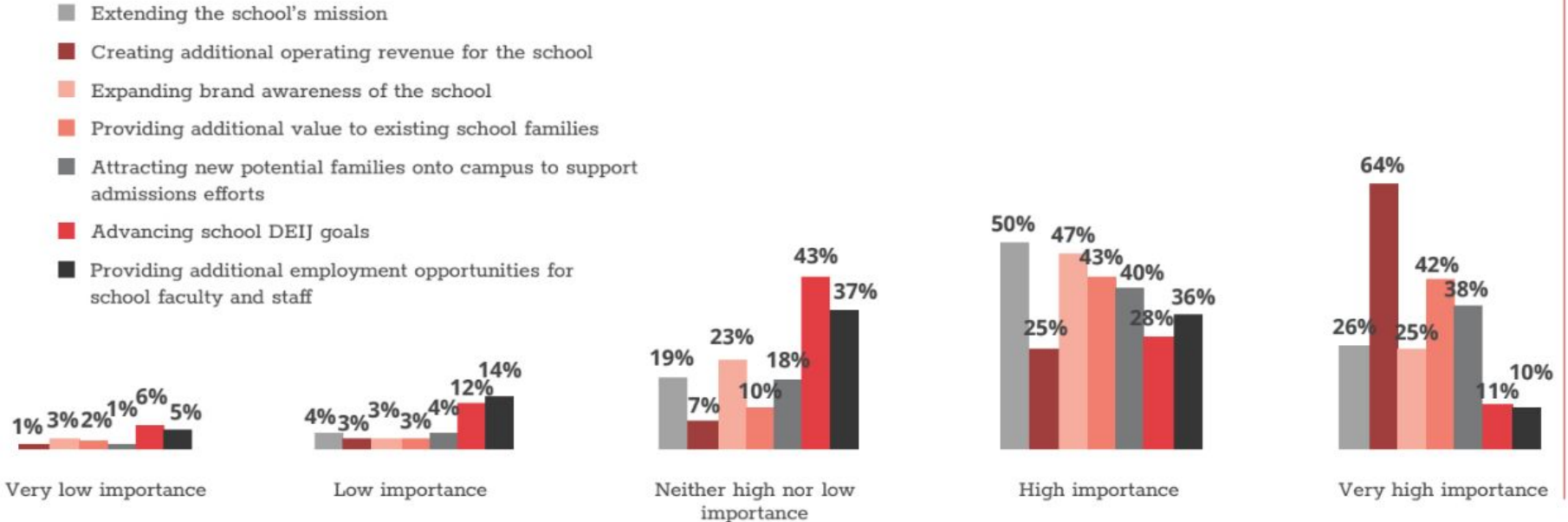


SUMMER PROGRAMS
AND AUXILIARY REVENUE
COLLABORATIVE

Auxiliary Program Strategic Priorities - Forced Ranking

Please rate the current importance to your school of the following potential auxiliary program strategic priorities.

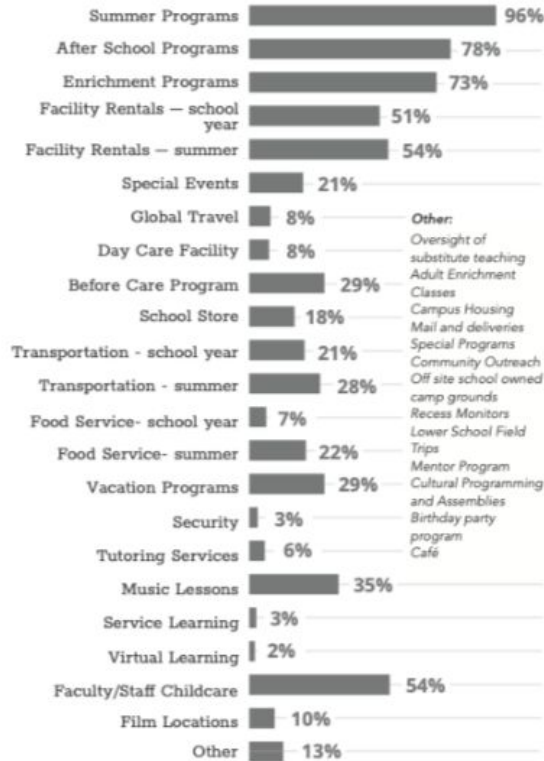
Source: 2024 SPARC Annual Compensation Report



Auxiliary is Evolving

More specifically...

What areas of responsibility fall under the Director of Auxiliary Programs (or equivalent)?



Summer
 After School
 Before School
 Enrichment Programs
 Facility Rental
 Events
 Global Travel
 Day Care (Faculty)
 School Store
 Transportation
 Food Service
 Vacation Camps
 Conference Care
 Music Lessons

Early Childhood Education
 Service Learning
 Security
 Lodging/Inn
 Vending
 Aquatics
 Conferences
 Professional Development
 Cemetery
 Film Locations
 Parking
 Kitchen Sink
 And...



Inventory of Current Programs



Sidwell Friends School Programs Example:

- Summer Programs
- Rentals
- School Shuttle/Transportation
- School Store
- Global Programs & Trips
- Tennis Club / Swim Club / Pickleball
- Winter & Spring Break Camps
- Tutoring/ HW Club
- LS & MS Extended Day Programs
- Special Event Days
- ECLC- (Early Childhood Learning Center)
- Enrichment Programs
- Music Lessons
- Summer Summit (PD Event)
- Revenue Collection - (prom, computer repairs, crew fees)
- College Counseling, DEI, other signature programs

Mission Example:

- Enhance School's core program by offering participants a variety of enriching opportunities consistent with the values of the school
- Support the school community financial both through revenue and through employment opportunities for Sidwell faculty, staff, students, and alumni
- Strengthen community ties by offering quality programs to a wider population

Program Goals Example:

- **Revenue Percentages** - 30% return on most programs
- **Enrichment Based Programs** - continue to enhance and grow programs
- **Faculty/Staff Employment Opportunities** - recruit and retain faculty, staff and alumni to work in programs



Accessorize & Style - The
(Grades 1-8)



AM Only + PM Only Pro



Art & Lit - The Handwork
(8)



Baseball Skills Camp (Gr



Basketball (Grades 2-8)



Chess Trainers (Grades 1-6)



Codemoji (Grades 1-5)



Counselor In Training - CIT (



Culinary Arts - The Handwoi
(Grades K-8)



Dance Explorations (Grades



Design & Build - The Handwork Studio
(Grades K-6)



Discovery Day Camp (Grades 2-5)



Discovery Junior Day Camp (Age 3-Grade 1)



Lacrosse Camp (Grades 2-8)



LEGO® Play-Well TEKologies (Grades K-5)

Summer Programs - lots of options!

SPARC

SUMMER PROGRAMS
AND AUXILIARY REVENUE
COLLABORATIVE

Inventory of Current Summer Programs

Summer Programs: what are you currently offering?

Traditional Day Camp	Sports Programs	Specialties and Academics	Partnership and Vendors	Rentals	Overnights

Inventory of Current School-Year Programs

Sample Spring Enrichment Sessions

April					
Monday	Tuesday	Wednesday	Thursday	Friday	
1 Creative Adventures K-4 Floor Hockey 2-4 Nature Club K-2	2 Tennis 1-4 Debate 3-4 Cooking PK-1 Lego PK-1 Flag Football 2-4	3 Little Veterinarians PK-1 Sewing 2-4 Creative Writing 2-4 Color Lab K-2	4 Lemonade Stand PK-1 Archery 2-4 Gymnastics PK-1 Chia Chinese PK-4 Written Out Loud 3-4 Band	5 Tae Kwon DO K-4 Advanced Chess 2-4 Lego PK-1 Chia Chinese PK-4 Performing Arts 1-4	
8 Creative Adventures K-4 Floor Hockey 2-4 Nature Club K-2 Beginner Chess PK-1	9 Tennis 1-4 Debate 3-4 Cooking PK-1 Lego PK-1 Flag Football 2-4	10 Little Veterinarians PK-1 Sewing 2-4 Creative Writing 2-4 Color Lab K-2	11 Lemonade Stand PK-1 Archery 2-4 Gymnastics PK-1 Chia Chinese PK-4 Written Out Loud 3-4 Band	12 Tae Kwon DO K-4 Advanced Chess 2-4 Lego PK-1 Chia Chinese PK-4 Performing Arts 1-4	
15 Creative Adventures K-4 Floor Hockey 2-4 Nature Club K-2 Beginner Chess PK-1	16 Tennis 1-4 Debate 3-4 Cooking PK-1 Lego PK-1 Flag Football 2-4	17 Little Veterinarians PK-1 Sewing 2-4 Creative Writing 2-4 Color Lab K-2	18 Lemonade Stand PK-1 Archery 2-4 Gymnastics PK-1 Chia Chinese PK-4 Written Out Loud 3-4 Band	19 Tae Kwon DO K-4 Advanced Chess 2-4 Lego PK-1 Chia Chinese PK-4 Performing Arts 1-4	
22 Creative Adventures K-4 Floor Hockey 2-4 Nature Club K-2 Beginner Chess PK-1	23 No SPARC	24 Little Veterinarians PK-1 Sewing 2-4 Creative Writing 2-4 Color Lab K-2	25 Lemonade Stand PK-1 Archery 2-4 Gymnastics PK-1 Chia Chinese PK-4 Written Out Loud 3-4 Band	26 Tae Kwon DO K-4 Advanced Chess 2-4 Lego PK-1 Chia Chinese PK-4 Performing Arts 1-4	
29 Creative Adventures K-4 Floor Hockey 2-4 Nature Club K-2 Beginner Chess PK-1	30 Tennis 1-4 Debate 3-4 Cooking PK-1 Lego PK-1 Flag Football 2-4				

Extended Day

Sidwell Friends' Auxiliary Programs Department offers extended day programming for Lower School students. To contact us, please email summer@sidwell.edu or call 202-537-8133.

+ **Early Risers**

+ **Extended Day**

- **SPARC**

SPARC is an acronym for Special Programs After Regular Classes. These programs include a variety of specialty classes that have included Coding, Sports, Drama, Chess and many more. Workshops are offered on a trimester schedule (fall, winter, and spring) and vary each season. For information about the latest SPARC offerings, please reach out to the program coordinator at summer@sidwell.edu.

+ **Special Events**

+ **Campus Shuttle**



AUXILIARY PROGRAMS CONFERENCE

Inventory of Current School-Year Programs

School Year Programs: what are you currently offering?

Extended Day LS, MS, Early Care	Enrichment	Music Lessons, Tutoring, HW Club	Sports Leagues and Clinics	Facility Rentals	Other

Inventory of Other Programs

Are there other programs or initiatives in the school that would be better suited under an Auxiliary Programs umbrella?

Criteria include:

- Revenue-generating or fee-based programs or events
- Programs occurring outside of the school day
- Adult or community programs
- Additional services - tutoring, SAT prep, testing,
- Real Estate income
- Athletic Programming outside of core academic day
- School Store - online, brick and mortar
- Theater tickets sales
- Other

Wish List/Brainstorm New Initiatives

Are there new programs or initiatives that could be created and put under an Auxiliary Programs umbrella?

- Strategic Plan initiatives
- Faculty Passion Projects
- Strategic Priorities - new entrepreneurial ideas:
 - Additional Revenue Driven Programs
 - Extending the Brand of the School Initiatives
 - Admissions Lead Generating programs
 - Employment Enhancement opportunities
- New buildings or signature programs to leverage



Inventory of Other Programs

Wish List or Other Programs: what could be put under the Auxiliary Umbrella?

Option 1	Option 2	Option 3	Option 4

Building the Auxiliary Portfolio

Considerations as you build the portfolio:

- Balance Strategic Priorities
- School Year Services
- Summer Season
- Any “Pet” Projects
- Target net revenue number
- Resources and Investment
- Failure Factor
- What else?



What are you taking from the buffet?



Summer Program Models

- Traditional Day Camp
- Sports Program
- Specialty and Academic Programs
- Partnership and Vendor
- Rentals
- Overnight

Summer Program Models



Traditional Day Camp						
# of Weeks	Enrollments		Potential Gross Revenue		Potential Net Revenue	
6	Low	High	Low	High	25%	40%
\$400	100	150	\$240,000	\$360,000	\$60,000	\$144,000
	150	200	\$360,000	\$480,000	\$90,000	\$192,000
	200	225	\$480,000	\$540,000	\$120,000	\$216,000
	225	275	\$540,000	\$660,000	\$135,000	\$264,000
	275	325	\$660,000	\$780,000	\$165,000	\$312,000

Summer Program Models



Sports Programs

# of Weeks	Enrollments		Potential Gross Revenue		Potential Net Revenue	
8	Low	High	Low	High	30%	50%
\$400	25	50	\$80,000	\$160,000	\$24,000	\$80,000
	50	75	\$160,000	\$240,000	\$48,000	\$120,000
	75	100	\$240,000	\$320,000	\$72,000	\$160,000
	100	125	\$320,000	\$400,000	\$96,000	\$200,000
	125	150	\$400,000	\$480,000	\$120,000	\$240,000

Summer Program Models



Specialty and Academic Programs						
# of Weeks	Enrollments		Potential Gross Revenue		Potential Net Revenue	
4	Low	High	Low	High	20%	40%
\$500	24	48	\$48,000	\$96,000	\$9,600	\$38,400
	48	90	\$96,000	\$180,000	\$19,200	\$72,000
	90	120	\$180,000	\$240,000	\$36,000	\$96,000
	120	150	\$240,000	\$300,000	\$48,000	\$120,000
	150	200	\$300,000	\$400,000	\$60,000	\$160,000

Summer Program Models



Partnership and Vendor Programs						
# of Weeks	Enrollments		Potential Gross Revenue		Potential Net Revenue	
8	Low	High	Low	High	20%	50%
\$500	24	48	\$96,000	\$192,000	\$19,200	\$96,000
	48	90	\$192,000	\$360,000	\$38,400	\$180,000
	90	120	\$360,000	\$480,000	\$72,000	\$240,000
	120	150	\$480,000	\$600,000	\$96,000	\$300,000
	150	200	\$600,000	\$800,000	\$120,000	\$400,000

Summer Program Models



Overnight Programs						
# of Weeks	Enrollments		Potential Gross Revenue		Potential Net Revenue	
6	Low	High	Low	High	10%	50%
\$800	24	48	\$115,200	\$230,400	\$11,520	\$115,200
	48	90	\$230,400	\$432,000	\$23,040	\$216,000
	90	120	\$432,000	\$576,000	\$43,200	\$288,000
	120	150	\$576,000	\$720,000	\$57,600	\$360,000
	150	200	\$720,000	\$960,000	\$72,000	\$480,000

Summer Program Models



Facility Rentals			
Potential Gross Revenue		Potential Net Revenue	
Low	High	60%	85%
\$15,000	\$30,000	\$9,000	\$25,500
\$30,000	\$50,000	\$18,000	\$42,500
\$50,000	\$100,000	\$30,000	\$85,000
\$100,000	\$200,000	\$60,000	\$170,000
\$200,000	\$300,000	\$120,000	\$255,000

School Year Program Models

- Extended Day
- Enrichment
- Music Lessons
- Tutoring / HW Club
- Facility Rentals
- Sports Leagues and Clinics

School Year Program Models



Extended Day						
School Days	Enrollments		Potential Gross Revenue		Potential Net Revenue	
170	Low	High	Low	High	10%	40%
\$20	10	20	\$34,000	\$68,000	\$3,400	\$27,200
	20	40	\$68,000	\$136,000	\$6,800	\$54,400
	40	50	\$136,000	\$170,000	\$13,600	\$68,000
	50	80	\$170,000	\$272,000	\$17,000	\$108,800
	80	125	\$272,000	\$425,000	\$27,200	\$170,000

School Year Program Models



Enrichment Workshops						
Seasons	Enrollments		Potential Gross Revenue		Potential Net Revenue	
3	Low	High	Low	High	20%	40%
\$250	30	50	\$22,500	\$37,500	\$4,500	\$15,000
	50	75	\$37,500	\$56,250	\$7,500	\$22,500
	75	100	\$56,250	\$75,000	\$11,250	\$30,000
	100	150	\$75,000	\$112,500	\$15,000	\$45,000
	150	300	\$112,500	\$225,000	\$22,500	\$90,000

School Year Program Models

Enrichment Programs



- Fall Enrichment offerings
- Each workshop adds up
- 3 seasons offered

SPARC 2023/2024

Fall SPARC

Monday Beginner Chess	\$ 4,755.00
Monday Soccer	\$ 5,400.00
Monday Floor Hockey	\$ 4,035.00
Monday Lego Robotics	\$ 3,360.00
Tuesday Movement and Mindfulness	\$ 4,370.00
Tuesday Sports & Scratch	\$ 4,160.00
Tuesday Cooking	\$ 3,930.00
Tuesday Tennis	\$ 5,365.00
Tuesday Debate	\$ 6,245.00
Tuesday Debate (2)	\$ 4,225.00
Wednesday Spanish Club	\$ 3,380.00
Wednesday Gymnastics	\$ 2,275.00
Wednesday Creative Adventures	\$ 0.00
Wednesday Sewing	\$ 3,070.00
Wednesday Lego Robotics	\$ 4,175.00
Wednesday Chess Wizards	\$ 0.00
Thursday Cooking	\$ 3,280.00
Thursday Gymnastics	\$ 3,880.00
Thursday My 1st Piggy Bank	\$ 3,170.00
Thursday & Friday Chia Chinese	\$ 4,175.00
Friday Advanced Chess	\$ 5,265.00
Friday Tae Kwon Do	\$ 5,310.00
CANCELLED Friday Chia Chinese	\$ 0.00
CANCELLED Friday Performance Arts	\$ 0.00

Fall SPARC Totals:

\$ 83,825.00

\$ 0.00

\$ 83,825.00

School Year Program Models

Enrichment Programs

- Enrichment offering summary
- Detailed accounts



SPARC 2023/2024

\$ 337,405.00

Fall SPARC

03 0400 0000 (LS Extended Day) \$ 0.00

03 0400 0103 (LS SPARC) \$ 83,825.00

Total: \$ 83,825.00

Winter SPARC

03 0400 0103 (LS SPARC) \$ 87,355.00

Total: \$ 87,355.00

Spring SPARC

03 0400 0103 (LS SPARC) \$ 79,150.00

Total: \$ 79,150.00

Summer Sampler SPARC

02000 (Handwork - Bethesda) \$ 2,550.00

Total: \$ 2,550.00

Lower School Band

03 0400 0103 (LS SPARC) \$ 17,750.00

Total: \$ 17,750.00

Middle School SPARC

02 0400 0103 (MS SPARC) \$ 21,905.00

Total: \$ 21,905.00

Lacrosse SPARC

02 0400 0103 (MS SPARC) \$ 13,945.00

03 0400 0103 (LS SPARC) \$ 7,740.00

Total: \$ 21,685.00

School Year Program Models

Special Event Programs



- Days off
- Half Days

Special Event Days	\$ 25.00		
10/6 - LS No School Day - Trip to the Pumpkin Patch!	\$ 3,690.00		
10/19 - LS Half Day Program (12:00pm - 3:00pm)	\$ 1,760.00		
10/19 - LS Half Day Program (12:00pm - 6:00pm)	\$ 1,350.00		
10/19-MS Half Day Program (12:00-6:00pm)	\$ 210.00		
10/28 - Kids Night Out (5:00pm - 9:00pm)	\$ 750.00		
11/16 - LS Specials Night (6:00pm - 8:00pm)	\$ 275.00		
12/4 - LS No School Day - Trip to the Aquarium!	\$ 3,600.00		
12/9 - Kids Night Out (4:00pm - 8:00pm)	\$ 925.00		
2/13 - LS Half Day Program (12:00pm - 2:00pm)	\$ 895.00		
2/13 - LS Half Day Program (12:00pm - 6:00pm)	\$ 1,365.00		
2/24 - Kids Night Out (5:00pm - 8:00pm)	\$ 1,025.00		
2/29 - LS No School Day - Trip to Port Discovery!	\$ 3,600.00		
4/23 - LS Half Day Program (12:00pm - 2:00pm)	\$ 400.00		
4/23 - LS Half Day Program (12:00pm - 6:00pm)	\$ 750.00		
Special Event Days Totals:	\$ 20,620.00	\$ 0.00	\$ 20,620.00

School Year Program Models



Music Lessons						
semester lessons	Enrollments		Potential Gross Revenue		Potential Net Revenue	
15	Low	High	Low	High	5%	20%
\$50	30	50	\$22,500	\$37,500	\$1,125	\$7,500
	50	75	\$37,500	\$56,250	\$1,875	\$11,250
	75	100	\$56,250	\$75,000	\$2,813	\$15,000
	100	150	\$75,000	\$112,500	\$3,750	\$22,500
	150	300	\$112,500	\$225,000	\$5,625	\$45,000

School Year Program Models



Tutoring / HW Club						
semester lessons	Enrollments		Potential Gross Revenue		Potential Net Revenue	
15	Low	High	Low	High	5%	30%
\$75	30	50	\$33,750	\$56,250	\$1,688	\$16,875
	50	75	\$56,250	\$84,375	\$2,813	\$25,313
	75	100	\$84,375	\$112,500	\$4,219	\$33,750
	100	150	\$112,500	\$168,750	\$5,625	\$50,625
	150	300	\$168,750	\$337,500	\$8,438	\$101,250

School Year Program Models



Facility Rentals - Field or Gym Occurrences

(e.g. 8/hours weekend and 3 hours night = 37 hrs /week)

Hours /week	Enrollments		Potential Gross Revenue		Potential Net Revenue	
37	Low	High	Low	High	50%	85%
\$150	10	12	\$55,500	\$66,600	\$27,750	\$56,610
	12	48	\$66,600	\$266,400	\$33,300	\$226,440
	48	60	\$266,400	\$333,000	\$133,200	\$283,050
	60	75	\$333,000	\$416,250	\$166,500	\$353,813
	75	100	\$416,250	\$555,000	\$208,125	\$471,750

School Year Program Models



Sports Leagues and Clinics						
Seasons	Enrollments		Potential Gross Revenue		Potential Net Revenue	
4	Low	High	Low	High	20%	60%
\$250	30	50	\$30,000	\$50,000	\$6,000	\$30,000
	50	75	\$50,000	\$75,000	\$10,000	\$45,000
	75	100	\$75,000	\$100,000	\$15,000	\$60,000
	100	150	\$100,000	\$150,000	\$20,000	\$90,000
	150	300	\$150,000	\$300,000	\$30,000	\$180,000

Define Portfolio and Desired ROI

- Design and Refine your Auxiliary Portfolio
- Summarize your portfolio based on existing and potential programs.
- Identify your desired ROI / target Net Revenue
- Evaluate strategic alignment of programs
- Identify Categories as needed
- Create Overall Budget / Projections (see sample)

Auxiliary Portfolio Model

Total Auxiliary	
Gross Revenue	\$3,010,000
% Return	38%
Net Revenue	\$1,155,000

	Summer							
	Day Camp	Soccer	Tennis	Summer Studies	Art Studios	Service Learning	Robotics	Total
Gross Revenue	\$300,000	\$200,000	\$150,000	\$150,000	\$300,000	\$50,000	\$175,000	\$1,325,000
% Return	35%	50%	45%	25%	30%	10%	30%	35%
Net Revenue	\$105,000	\$100,000	\$67,500	\$37,500	\$90,000	\$5,000	\$52,500	\$457,500

	School Year							
	LS Extended Day	LS Enrichment	Early Risers	MS Extended Day	Music Lessons	HW Club	School Store	Total
Gross Revenue	\$250,000	\$200,000	\$30,000	\$100,000	\$120,000	\$45,000	\$300,000	\$1,045,000
% Return	45%	30%	30%	20%	10%	10%	20%	27%
Net Revenue	\$112,500	\$60,000	\$9,000	\$20,000	\$12,000	\$4,500	\$60,000	\$278,000

	Community Programs							
	Facility Rentals	Tennis Club	Futsal League	Basketball League	Adult Classes	Music Together	Pickleball	Total
Gross Revenue	\$350,000	\$25,000	\$50,000	\$100,000	\$25,000	\$50,000	\$40,000	\$640,000
% Return	85%	30%	50%	60%	10%	30%	30%	66%
Net Revenue	\$297,500	\$7,500	\$25,000	\$60,000	\$2,500	\$15,000	\$12,000	\$419,500

Auxiliary Specific:

new initiative,
students, program?

Thing:

new building,
new bus, new
materials?

When would
you add to
the portfolio?

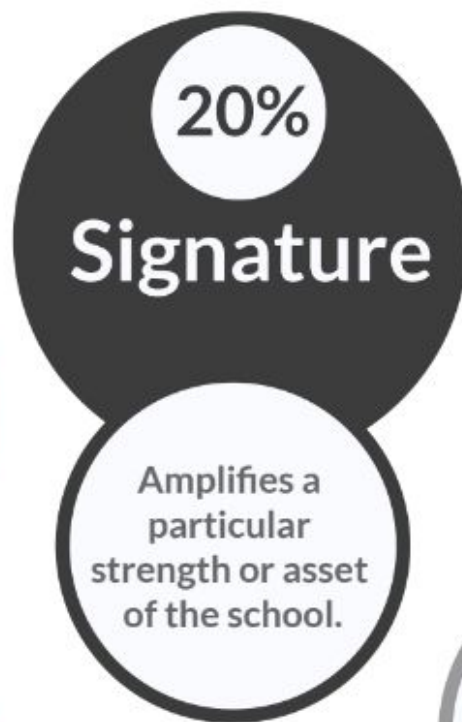
External:

market change,
competitor goes
away, etc.?

Internal:

a change in the
way your school
operates, culture,
systems, etc.

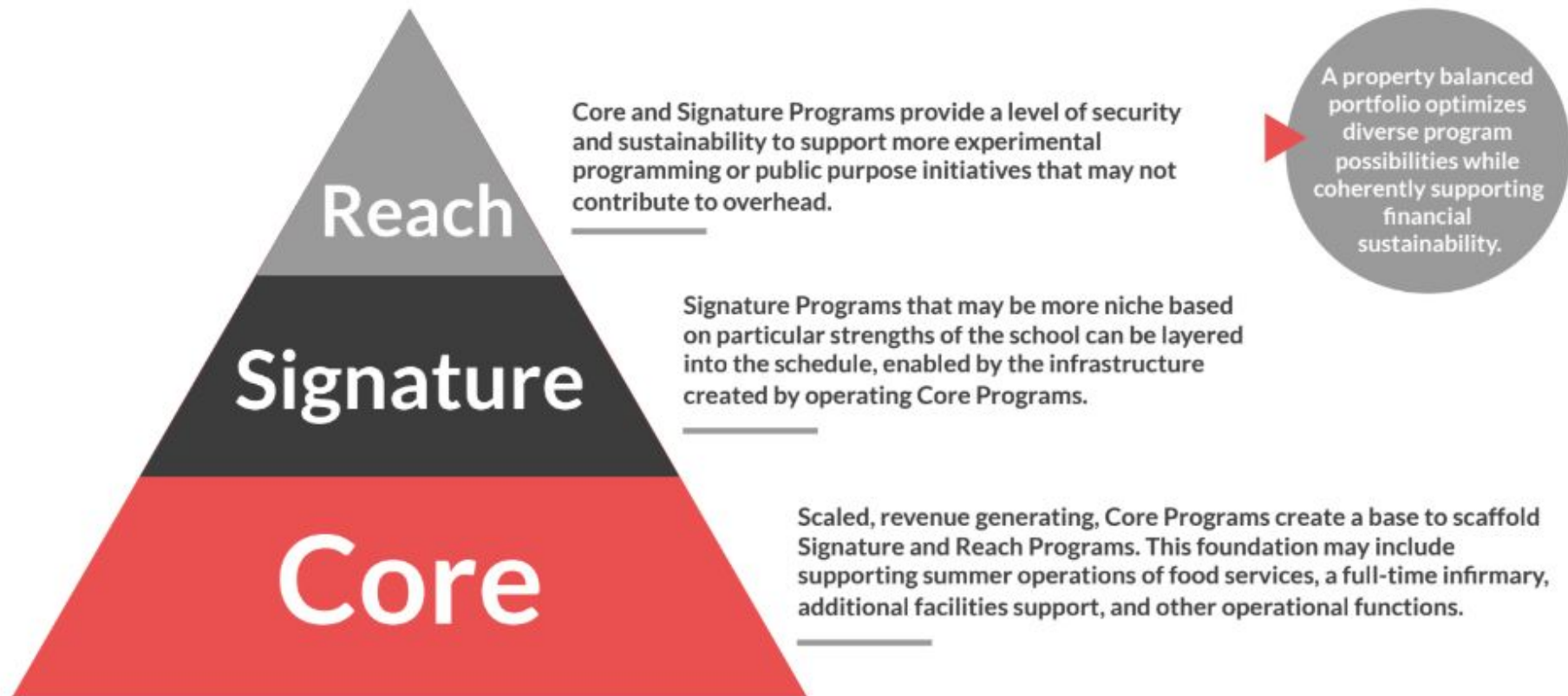
A Portfolio Approach to Auxiliary



A balanced portfolio will meet the highest priorities while serving other objectives.



Scaffolding a Summer Portfolio



Portfolio Approach: A Framework for Summer

70%

Core Programs

of the utilization (space, time, resources)

Largest programs that tend to be more generalized and traditional. These are “tried and true” programs with steady demand.

Traits:

- Solid margins with high overall net
- Replicable
- Scalable
- Longest duration (5-10 weeks)
- Solidly reliable and predictable over time

Examples:

- Traditional Day Camp
- General Sports Camp
- General Enrichment Program
- High Value Strategic Partnerships

20%

Signature Programs

of the utilization (space, time, resources)

Programs that elevate a particular strength of the school or specialize in a skill or content area. This is where program design may be flexible and respond to trends in the market. Generally fall in the comfort zone, even at the edges, of what the school knows and is able to do.

Traits:

- Solid margins with moderate overall net
- Replicable but may necessitate more specialized expertise
- Scale is limited
- Moderate duration (1-4 weeks)
- Generally reliable and predictable over time

Examples:

- Sports clinics
- Themed enrichment camp (i.e STEM, Arts, Academics)
- A unique strength
- Travel programs
- Partnership rentals

10%

Reach Programs

of the utilization (space, time, resources)

Programs that may be less profitable or popular but are closely aligned to mission and values. May also be the edge of innovation for trying new, untested ideas. May be less comfortable for the organization.

Traits:

- Completely untested programs with unknown margins (or low margins and low or possibly no net)
- Scale is limited or in start-up mode
- Low/moderate duration (1 day to 4 weeks)
- Less certain and predictable over time

Examples:

- One day workshops/clinics
- Subsidized scholars program
- Start-up/never been tried initiative
- Short term rentals

Note: The 70/20/10% distribution is a general guide. The distribution of this portfolio would shift if the strategic priorities were dramatically different. For example, if a school was not concerned with revenue but wanted to elevate a subsidized scholars program. Or a signature program over time becomes a core program in terms of scale and dependability.

SPARC

SUMMER PROGRAMS
AND AUXILIARY REVENUE
COLLABORATIVE

Portfolio Approach: A Framework for Summer

SIDWELL SUMMER

70% Core	20% Signature	10% Reach
Discovery Day Camp	Summer Studies & STEP	Summer Equity & Justice Institute
Basketball, Soccer & Tennis Camps	Woodworking Soap Box Derby	Smaller SFS Sports programs - Wrestling, Lacrosse, Baseball, Field Hockey
S'more Fun, Extended Day	Culinary Arts	



Discovery Day Camp (Grades 2-5)



Discovery Junior Day Camp (Age 3-Grade 1)



Lacrosse Camp (Grades 2-8)



LEGO® Play-Well TEKologies (Grades K-5)



Machine Sewing - DEAN Adventure Camps (Grades 4-11)



Mixed Media - DEAN Adventure Camps (Grades 1-8)

Best Practices for Engaging Target Audiences

- Understand Audiences - Internal & External
- Personalize Message and Communication
- Optimize Digital Presence (leverage existing)
- Build & Foster Relationships
- Deliver Best Programs & Customer Service
- Develop Clear & Consistent Messaging
- Track Metrics & Evaluate

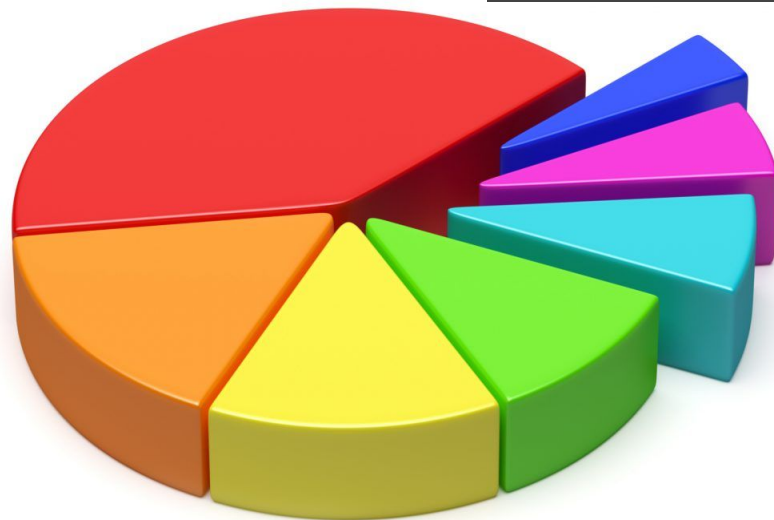
See Checklist Resource for more details

How Do I Spend My Time? Real vs Ideal

Allocate your time Real vs Ideal - add up to 100%

- Program Development
- Marketing and Communications
- Finance/Budget Management
- Personnel and HR
- Operations
- Risk Management
- Other

Are your
investing in the
right places?



SPARC Score Card - Assessment of Current & Future Programs

Schools that have a portfolio of different auxiliary programs have to make decisions strategically on how to best allocate resources among the various programs. Resources include:

- staff time for program development and management;
- facilities use such as dorms, classrooms, or athletic space assignments,
- investments in future growth of programs.

Current programs can span a number of different categories in how they are organized and the audiences served. These various programs have different values in how they align with the defined Auxiliary Programs Statement of Purpose and primary and secondary strategic goals. Ideally, Auxiliary Programs have a balance among the portfolio of programs in reaching these strategic goals.

The Score Card is a tool to analyze current and future programs on specific criteria, which can be weighted as situations change. The scorecard results can then help place the programs on a matrix to help visually assess the whole portfolio as it currently stands and how things can shift in the future. The scorecard can be applied to all current programs as a way to measure effectiveness in meeting the strategic goals as well as the operational impact.

The Score Card can be used to help evaluate proposals for new summer programs and potential new initiatives. The scorecard is meant to be a living tool that can be modified as strategic goals evolve.

SPARC Scorecard

- Quantify the unquantifiable
- Measure or predict impact of programs
- Draw attention to specific decisions that need to be made
- Connect strategic priorities to program direction
- Develop and evaluate new and existing programs

SPARC Auxiliary Programs Scorecard	
Program Name:	
Strategic Value	Rating
<i>for each topic, rate as specified (low to high)</i>	
Extends the school mission (1-10)	
Generates net revenue (1-10)	
Increases school brand awareness (1-10)	
Cultivates applicants for school admission (1-10)	
Enhances student and family experience (1-4)	
Incubates innovative programs (1-3)	
Create opportunities for faculty/staff/coach employment (1-3)	
Total Strategic Value (out of 50 points, higher = stronger alignment)	0
Institutional Cost	Rating
<i>for each topic, rate 1-5 (low to high)</i>	
Impact on internal administrative resources (ie. registration, payroll) (less impact = low)	
Impact on school staff working during summer (less impact = low)	
Impact on classroom facilities projects/work (less impact = low)	
Impact on athletic facilities (wear and tear small = low)	
Impact on facilities in general (wear and tear on facilities small = low)	
Impact on scheduling and timing (fits into summer schedule easily = low)	
Impact on risk assessment (no additional insurance or risk consideration = low)	
Impact on challenge to implement (easy to implement = low)	
Impact on Auxiliary Dept. work load (little impact/work = low)	
Impact on morale/overall community feeling (positive feelings = low)	
Total Institutional Cost (out of 50 points, higher = more impact, lower is better)	0

Matrix - Visual Assessment of Current and Future Programs

The Boston Matrix (Product Portfolio Model) is a visual that can:

- Show programs based on mission alignment and strategic value along with operational impact
- Highlight other criteria, such as participation and profitability or market share and market growth.

4 quadrants of the matrix:

Stars - strong programs - need continued investment to sustain growth. These programs' growth will eventually slow and as long as they can stay competitive in the market, they will become Cash Cows.

Descriptors: High market growth, High market share, Cash Neutral, Strategy - Invest to grow

Cash Cows - programs that have reached their full growth potential, have a high market share without needing too much investment. These programs contribute to the revenue stream that is needed to help maintain the other programs, including the Stars.

Descriptors: Low market growth, High market share, Cash generating, Strategy - Harvest

Problem Programs/ Question Marks - programs that have potential but need a substantial amount of energy and investment to grow. Need to think strategically about which of these programs to invest in and which ones should be dropped from the portfolio. New programs - start-up costs until they reach their potential and move to be a Star program.

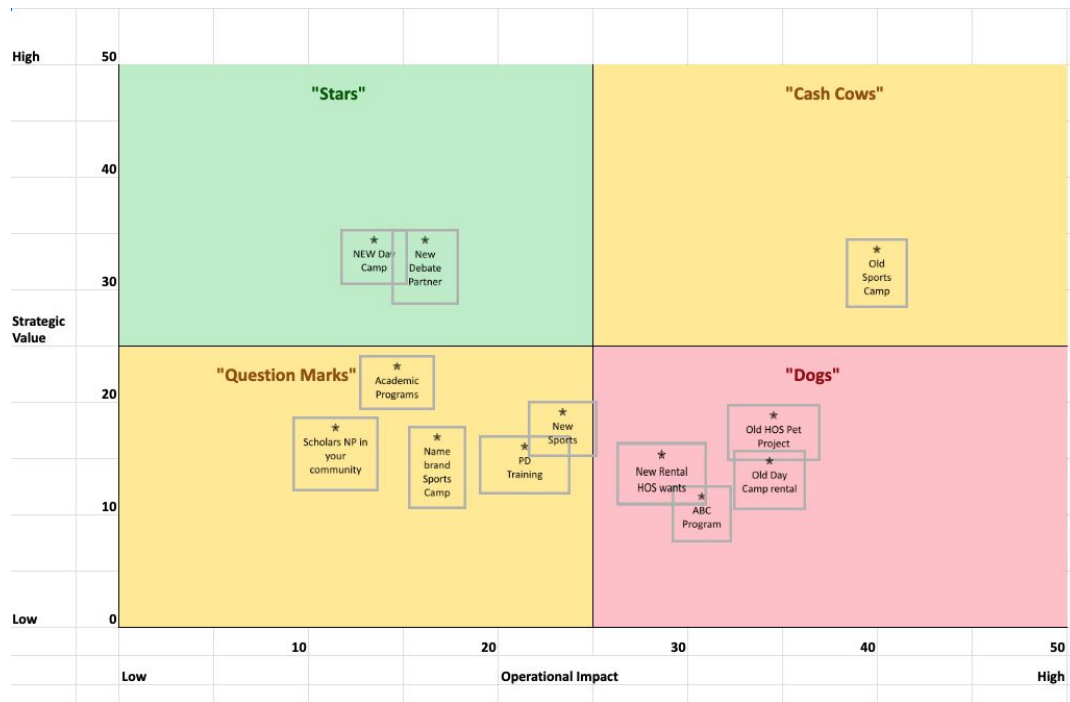
Descriptors: High market growth, Low market share, Cash absorbing, Strategy - Build

Dogs - programs have a low market share in what is a low growth market. These programs may generate enough money to break even and cover expenses but they are not worth investing more energy and resources on.

Descriptors: Low market growth, Low market share, Cash neutral, Strategy - Drop

SPARC Tools - Boston Matrix

- Tool to analyze 'portfolio' of programs
- Determine where to allocate resources
- Use to evaluate new and existing programs
- Ranks Strategic Value and Institutional Cost
- Visual of score card



Thanks! Keep in Touch!

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