

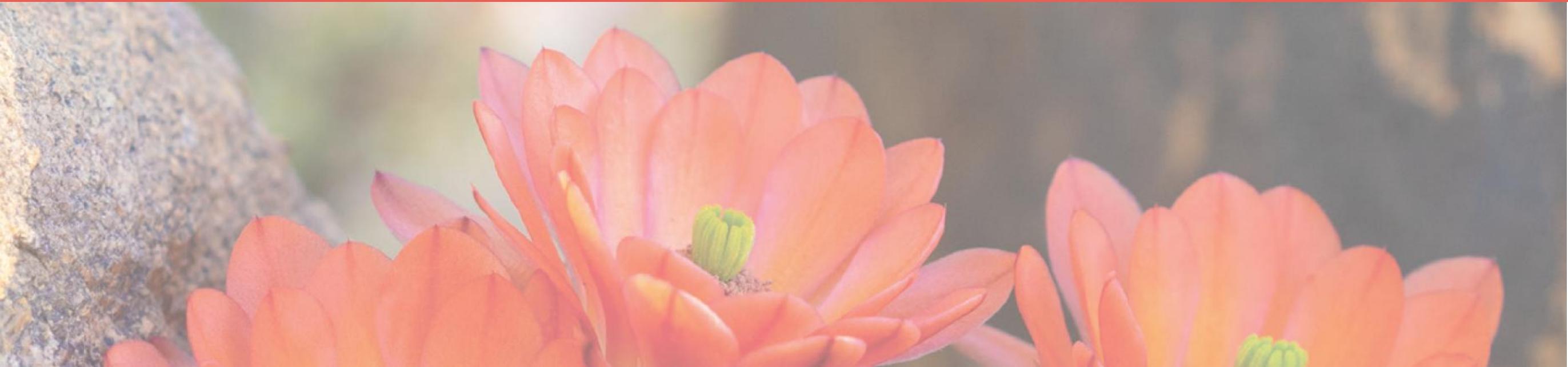
**SPARC**

SUMMER PROGRAMS  
AND AUXILIARY REVENUE  
COLLABORATIVE

# Measuring Your Impact

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November 3, 2022



# Session Outline

Develop Strategic Priorities

Design/Modify Your Programs

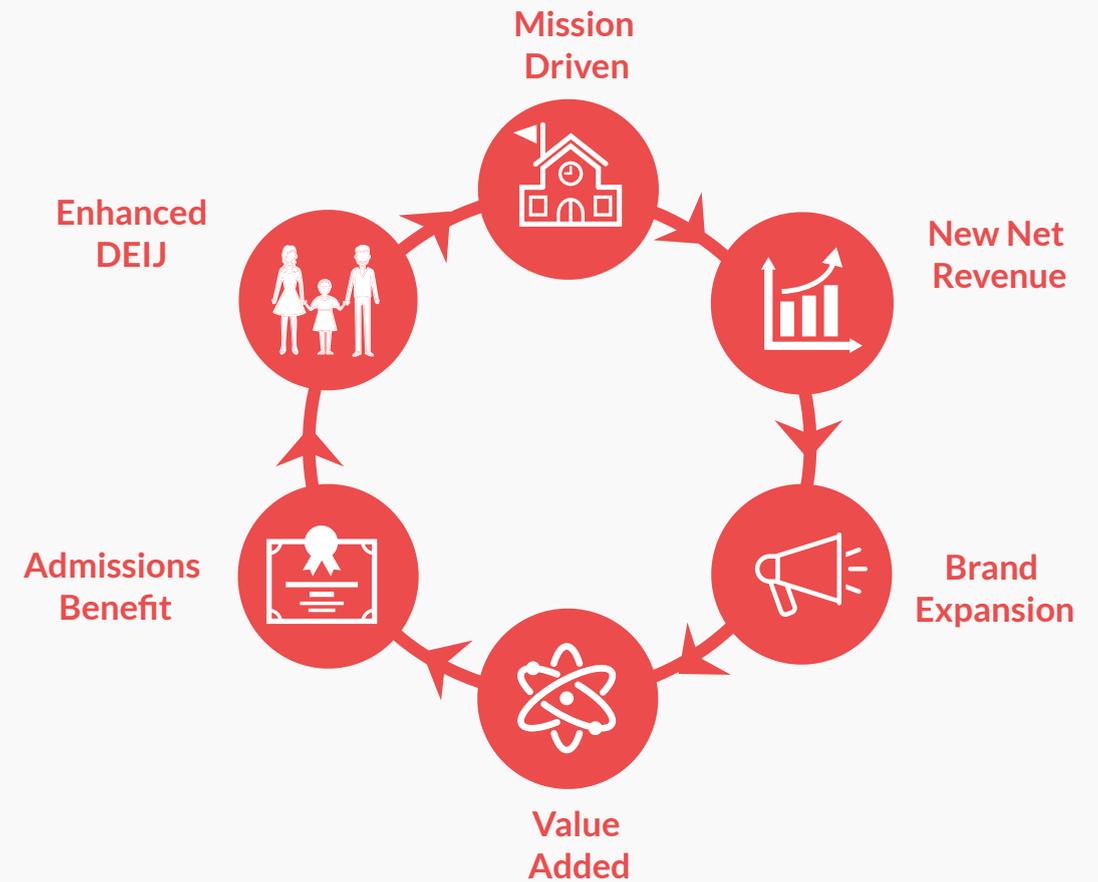
Allocate Your Time

Quantify Your Impact



# 1. Strategic Priorities

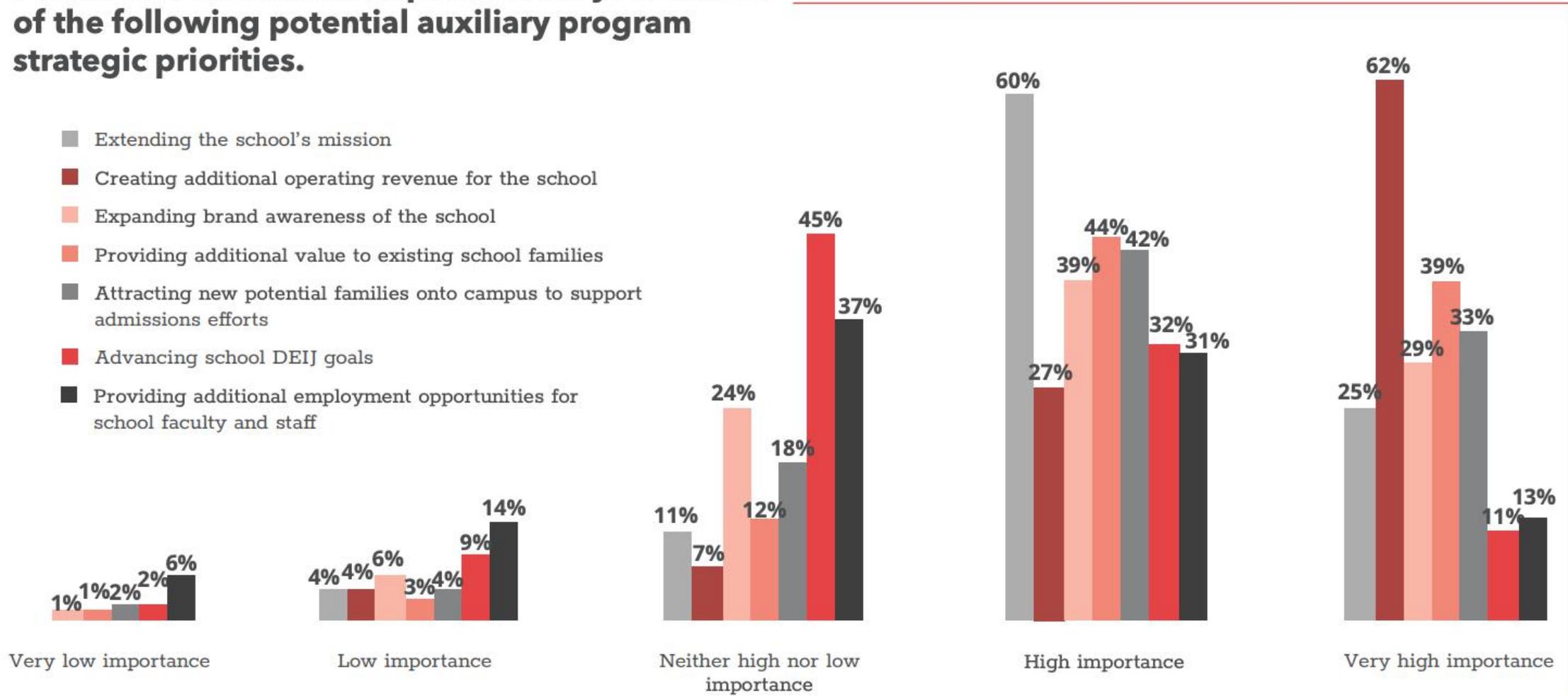
- Mission alignment
- Auxiliary as a whole vs. individual programs
- Portfolio concept
- Current norms
- Priority vs. benefit



# 2022 Compensation Report

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

- Extending the school's mission
- Creating additional operating revenue for the school
- Expanding brand awareness of the school
- Providing additional value to existing school families
- Attracting new potential families onto campus to support admissions efforts
- Advancing school DEIJ goals
- Providing additional employment opportunities for school faculty and staff



# Common Strategic Priorities

## **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 and 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

# Common Strategic Priorities

## **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

# Table Exercise #1

- Score your worksheet based on what you believe your current strategic priorities are at your school.
- Share with a partner.
- Discuss what you learned through this exercise as a table.

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**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**

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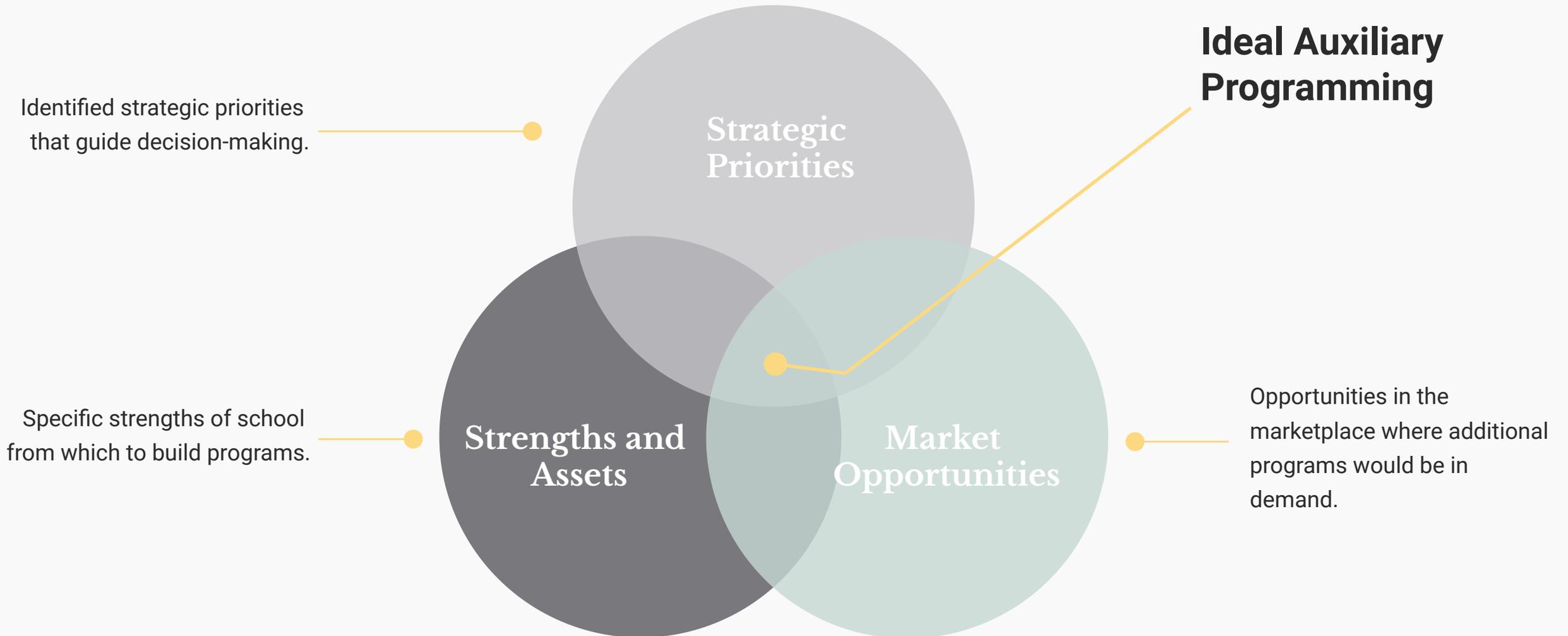
\_\_\_\_\_ **Other:**

**100**      **TOTAL Points**

# Engage in a Process

- Move from individual opinions to an institutionally agreed upon set of priorities
- Lead up...ask to go through this exercise
- Customize your Strategic Priorities sheet...should it include all six? More? Less? Curate the list based on your knowledge of your school
- Determine who should be involved
- Requires at least 2 meetings...likely more
  - Meeting 1...present the potential priorities
    - Ask individuals to score the sheet
    - Open the discussion to see where there is agreement...where there is disagreement
  - Meeting 2...develop clarity
    - Produce a document...galvanize the outcome in written form
- Develop group buy-in and messaging

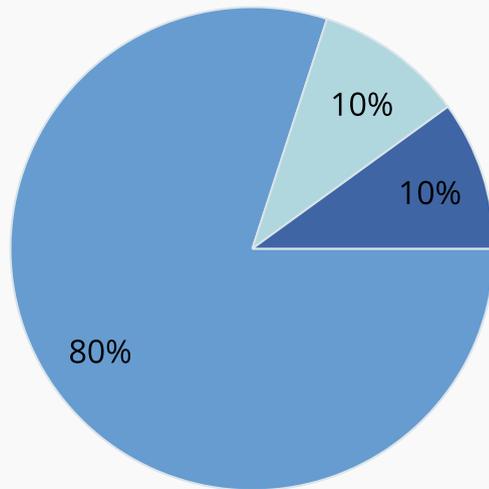
# 2. Auxiliary Program Design



# 3. Allocate Your Time

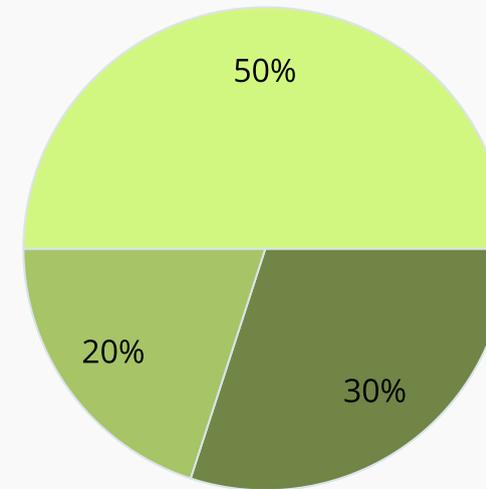
Are you spending your time as a leader focused on your strategic priorities?

Ranked Priorities



■ Revenue 80   ■ Admissions 10  
■ Value-Added 10

Director's Time



■ Summer 30   ■ Rentals 20  
■ After School 50

# 4. Quantify Your Impact

- You can't determine if you're successful unless you know what you're trying to accomplish
- SPARC Data and Dashboard Planning Group
  - Defining the metrics that matter
  - Individual support through tools and strategies
  - Working towards broad data collection for benchmarking purposes
  - Thanks to:
    - Karen McCann Director of Auxiliary Programs, Sidwell Friends School
    - David Sullivan Executive Director, Breakwater Learning
    - Vinita Ahuja Chief Strategy & Operations Officer, Milton Gottesman Jewish Day School
    - Drew Upchurch Director of Auxiliary Programs, Bolles School
    - Katie Kantz Director of Summer, Durham Academy
    - Melissa Williams Director of Auxiliary Services, Far Brook School
    - Heather Murphy Director of Auxiliary and Special Programs, Springside Chestnut Hill
- Push yourself to quantify the value that's difficult to quantify
- Measure auxiliary performance regularly, and at least annually

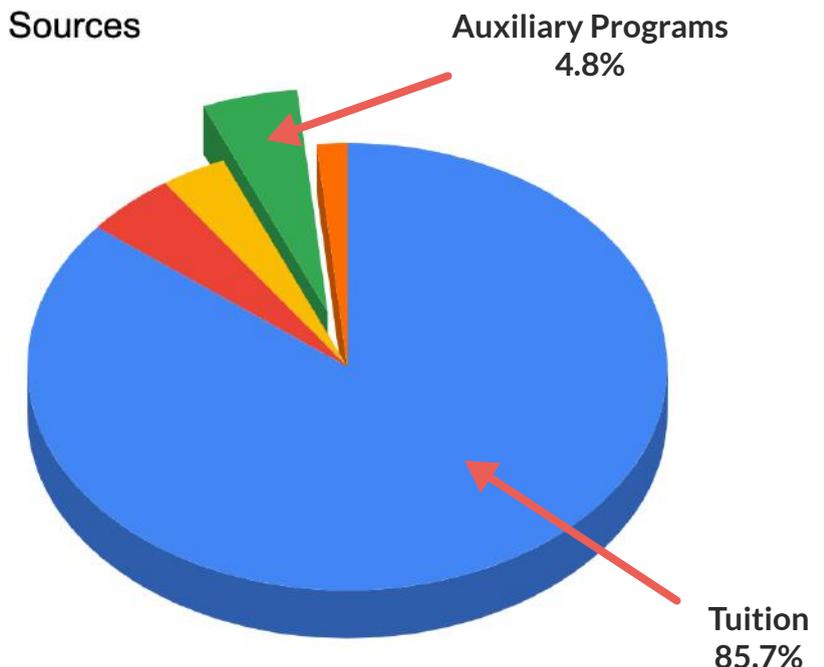
# What's Your Percentage?

As schools look to auxiliary programs to reduce their financial dependency on tuition, we encourage you to research and then highlight this metric for your school. Partner with your CFO to access the data and track this metric over time.

## Sample Independent School

Gross Operating Revenue		
Tuition	\$17,555,250.00	85.7%
Annual Fund	\$950,000.00	4.6%
Endowment Income	\$679,230.00	3.3%
Auxiliary Programs	\$985,000.00	4.8%
Other	\$313,780.00	1.5%
<b>Total Operating Revenue</b>	<b>\$20,483,260.00</b>	

FY22 Revenue Sources



# Financial Metrics

**Strategic Priority: Generate additional net operating revenue for the School.**

*SPARC Recommended:*

- Aggregated gross auxiliary revenue
- Aggregated net auxiliary revenue
- Aggregated profit margin
- Budget v. actual
- Auxiliary program portfolio allocation
- Gross auxiliary revenue as a percentage of total school revenue
- Financial aid and tuition remission awarded

*Additional Metrics to Consider:*

- Cost per camper/student
- Total marketing expenses as a % of gross revenue
- Total personnel expense as a % of gross revenue
- Amount of capital expenditures specific to auxiliary programs
- Quantify and clarify any indirect expenses or allocations to auxiliary budget such as utilities, depreciation, etc.

# Admissions Metrics

**Strategic Priority: Cultivate admissions applicants for the School.**

*SPARC Recommended:*

- Number of non-student children that have program experiences on your campus annually
- Number of school applicants that had a prior experience on campus in auxiliary programming
- Number of accepted students that had a prior experience on campus in auxiliary programming
- Number of enrolled students that had a prior experience on campus in auxiliary programming

*Additional Metrics to Consider:*

- Quantity of admissions materials provided to auxiliary participants
- Categorize enrolled students through auxiliary programs by desired admissions criteria (ie. diversity, financial capacity, etc.)

# School Community Value Metrics

**Strategic Priority: Provide added value to the School community through additional programs and services.**

*SPARC Recommended:*

- Number and percentage of current School students enrolled in auxiliary programs
- Number of School students employed through auxiliary programs
- Student participation rates in after school and enrichment programs

*Additional Metrics to Consider:*

- Participant/family survey data regarding program quality and program value
- Student participation rates in vacation programs

# Surrounding Community Metrics

**Strategic Priority: Strengthen the School's relationship with the surrounding community.**

*SPARC Recommended:*

- Number of community members that visited campus through auxiliary programs, events, or rentals
- Identify partnerships formed with local businesses
- Identify services provided to local community members

*Additional Metrics to Consider:*

- Identify additional partnerships with local organizations such as universities, non-profits, etc.
- Quantify number of jobs filled by a local workforce

# Innovative Program Metrics

**Strategic Priority: Advance the School's brand as an innovative leader in education.**

*SPARC Recommended:*

- Identify programs that were developed and incubated through auxiliary program initiatives
- Identify strategic partnerships with outside organizations that ultimately benefited the school beyond auxiliary programming
- Identify any PR generated by auxiliary programs

*Additional Metrics to Consider:*

- Quantify School brand visibility in advantageous locations through summer/auxiliary program outreach (ie. online, print, competitions, etc.)

# DEIJ Metrics

**Strategic Priority: Enhance the School's DEIJ goals and outcomes.**

*SPARC Recommended:*

- Quantify the extent to which the summer/auxiliary staff population mirrors student/camper population
- Make evident the alignment between the School's diversity statement and current practice in summer/auxiliary programs

*Additional Metrics to Consider:*

- Quantify the extent to which summer/auxiliary program partners or vendors are selected with DEIJ criteria in mind
- Demonstrate respect shown for holidays and program theme day alignment with DEIJ values

# Other Metrics

## **Program Data:**

- Numbers of auxiliary/summer program offerings
- Session lengths by program
- Number or percent of programs offered by 3rd party providers
- Survey response data

## **Participant Data:**

- Camper Retention rate
- Total number of participants served
- Enrollment by week/session
- Campers/student age range and distribution
- Average length of stay (summer)
- Day v. resident camper percentages
- International student percentage
- Representation from outside schools
- Geographic distribution of campers/students

# Other Metrics

## Personnel Data:

- Total number of auxiliary/summer program staff
- Staff retention rate
- School faculty/staff v. non-school faculty/staff leading auxiliary/summer programs
- Average age, level of education
- Total compensation to School faculty for their work with auxiliary/summer programs
- Average additional salary per School faculty member generated by their auxiliary/summer program employment
- Number of new School faculty and staff who were recruited through their work with auxiliary/summer programs

# Table Exercise #2

- What metrics do you use?
- Write the top three data points that you use to quantify the impact of your auxiliary programs...one per PostIt.
- Place them on your large paper and share with your table.
- Identify at least three new data points that you will now begin to track.



# Next Steps...

## You will...

- Develop a plan for putting this session into practice
- Lead up
- Quantify your time
- Determine your percentage
- Share your successes and challenges
- Seek each other out for advice and guidance

## SPARC will...

- Make resources and tools available
- Continue our work towards developing recommended core metrics
- Send out a survey in the near future

