



Seeds for Change Consulting, LLC

Market Opportunity Analysis

For

Camp Fire Inland Northwest



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Executive Summary

Project Scope

Seeds for Change Consulting, LLC (SFCC) was engaged in May, 2018 to prepare a Market Opportunity Analysis for Camp Fire USA Inland Northwest (CFINW). The framework of this analysis includes demographic and trend analyses, quantitative modeling; and demand estimates of traditional Camp Fire programming and afterschool opportunities within the defined market area.

CFINW and SFCC collaborated to develop the following parameters for this market analysis:

Camp Fire Inland Northwest Council Scope of Services

Seeds for Change will conduct the following consulting services for the Camp Fire Inland Northwest:

1. Review Camp Fire Inland Northwest operations to the extent necessary to prepare the Market Opportunity Analysis.
 - a. Phone interviews with staff and/or board as well as other internal and external stakeholders *as or if necessary*.
 - b. Review existing Camp Fire Inland Northwest programs in addition to other relevant documents, policies, annual reports as available.
2. Prepare the Market Opportunity Analysis.
 - a. Scope limited to Spokane County, Washington and Kootenai County, Idaho
 - b. Develop demographic assessment, trend analysis, competitive assessment, and demand model/estimates.
 - c. Identify opportunities to:
 - i. Expand youth services, including afterschool fee-for-services for Pre K through 12 in Kootenai County;
 - ii. Provide afterschool fee-for-services programs for Pre K through 12 in the Mead and Spokane School Districts as a subcontractor to either school districts or existing service providers as appropriate; and
 - iii. Provide an outdoor experience to more youth and to maximize usage at Camp Dart-Lo and Camp Sweyolakan.
 - iv. Provide supplemental fire-wise programming to area youth.

3. Prepare recommendations for next steps based on findings within the specified service area.

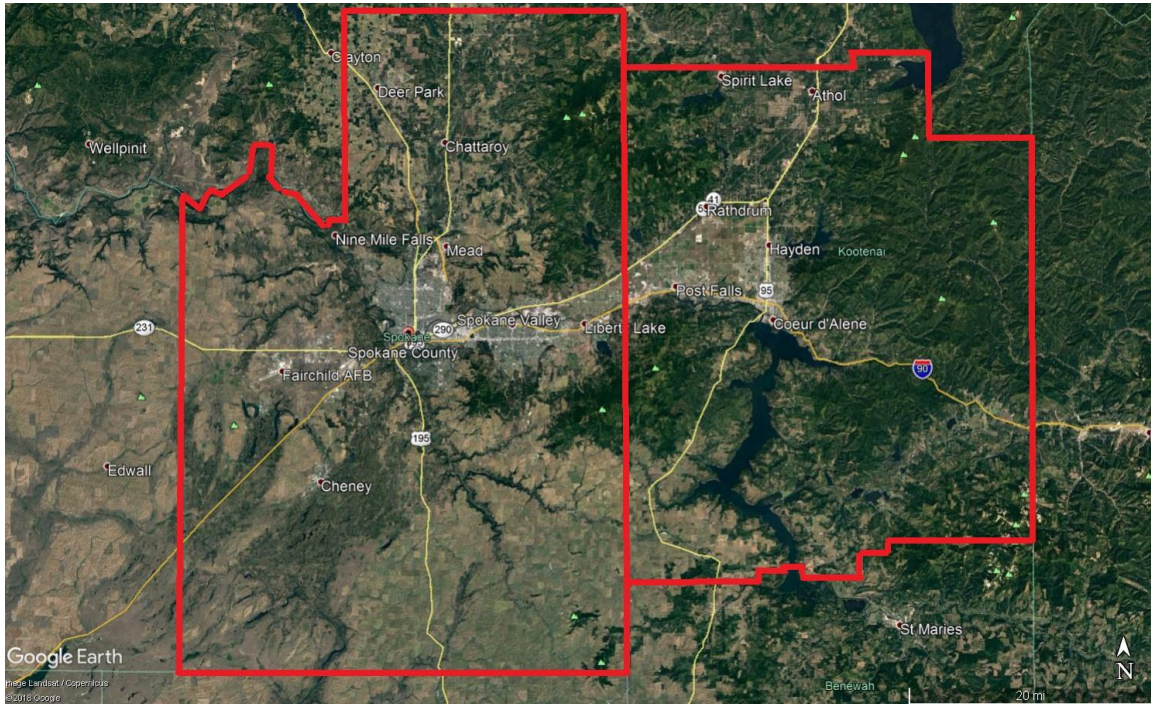


Figure 1 Study Area of Spokane and Kootenai Counties (Google Earth)

SFCC reviewed information provided by CFINW and compiled population demographics and information on competing programs within the designated areas to determine demand and capacity for a paid model, possible barriers to entry, and challenges to sustainability in a competitive market.

In 2017, CFINW adopted a strategic plan. This Market Opportunity Analysis can serve as a tool as the organization moves from planning to execution.

Organizational Strategies

- Build the organization’s fundraising capacity. Demonstrates to donors and funders both need and demand for high quality programs for area youth to help garner and leverage their financial support.
- Cultivate new partnerships in the community. Highlights opportunities for both new and enhanced partnerships with organizations and institutions.

Programmatic Strategies

- Expand the uses of Camps Sweyolakan and Dart-Lo. Focuses on increasing partnerships with the Mead and Spokane School Districts will have more impact on the potential integration of Camp Dart-Lo.

- Strengthen Camp Fire’s competitive advantage in the marketplace. Highlights areas of opportunity within the market. It also demonstrates where CFINW will not have a competitive advantage.
- Increase Year-Round Programming. Focuses primarily on the opportunity to expand CFINW’s impact into those nine months of school time and to the extent possible, increasing the utilization of both Camps Sweyolakan and Dart-Lo.

Operational Strategies

- Increase marketing and communications activities to build our brand. Can be used as a tool in both marketing and communications.
- Strengthen volunteer engagement. Can be used to inspire potential volunteers about the opportunities for youth that would be possible with the gift of their time.

Conclusion

- CFINW has seen a decline in donations and grants and has met those headwinds by constraining expenses. This underscores the necessity for potential service expansion suggested by the results of this Market Opportunity Analysis to be sustainable if not profitable.
- Kootenai County is a very limited market for growing a *sustainable* fee-for-service afterschool program at this time. There are two primary limiting factors.
 - Each major district offers its own afterschool program.
 - Disposable household income is constrained.
- Spokane Public Schools presents a growth opportunity for CFINW.
 - The District is receptive to additional community partners providing afterschool programming.
 - There is a gap in environmental programming that CFINW can fill through Camp Fire curriculum including, topically, fire-wise education.
 - A number of District campuses have licensed capacity but offer no afterschool programs.
- Mead School District presents limited opportunities for CFINW
 - There is an existing afterschool program at each campus.
 - CFINW’s strongest opportunity is to leverage the proximity of Camp Dart-Lo to Mead as an enrichment opportunity for the District’s students particularly in the areas of environmental and fire-wise education.

- This in turn could be used as a building block to further integrate with the District as a supplemental afterschool provider for its students.
- Camp Sweyolakan is remote and has accessibility challenges.
- There is sufficient unmet demand within the market area for quality afterschool programming for Grades K through 6th though much would require subsidies.
- While there are opportunities for growth in Grades 7th through 12th, participation rates fall dramatically suggesting that limited resources should be focused on the elementary grades where participation rates are higher.
- Programming should continue to integrate literacy and STEM content while providing a rich, unique, hands-on experience of the natural environment for kids consistent with state code and adopted Common Core standards.
- Program design and marketing will be critical to the success of any fee-for-service model and as well as for retention of CFINW participants in target areas.
- CFINW should work with each district and each campus to ensure that afterschool resources are easily located online. Finding information on afterschool programs in all districts in both Spokane and Kootenai County was incredibly challenging. As a parent seeking childcare alternatives, having those resources both standardized and readily accessible could increase participation and family satisfaction.

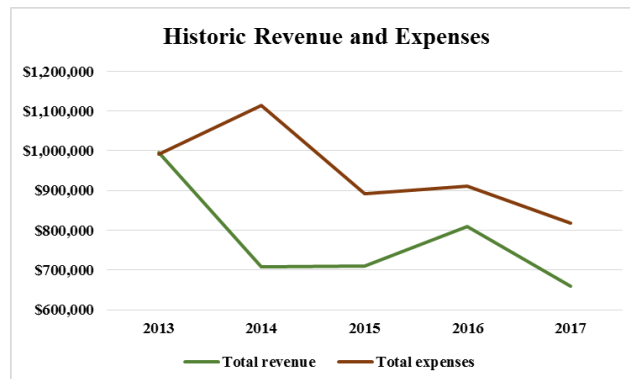
Background - Camp Fire Inland Northwest

Camp Fire USA Inland Northwest (CFINW) is a 501(c) 3 nonprofit founded in 1914 and headquartered in Spokane Valley, Washington. It offers programs for boys and girls ages 3 to 18 living in eighteen counties in Eastern Washington and Northern Idaho. Those include Benewah, Bonner, Boundary, Clearwater, Idaho, Kootenai, Latah, Lewis, Nez Perce, and Shoshone Counties in Idaho and Asotin, Ferry, Garfield, Lincoln, Pend Oreille, Spokane, Stevens, and Whitman Counties in Washington most of which are rural counties.

Camp Fire USA offers quality programs reflective of best practices in its Core Program Areas: Caring, Camping, Contributing and Connecting. CFINW’s mission is to build caring, confident youth and future leaders by providing relevant programming that helps each young person ignite their “spark.” Its focus was on youth development through educational and service learning opportunities with hands-on experiences in leadership, natural science and outdoor skills providing small group experiences for kids K through 12th grade. Clubs are regularly scheduled small groups that meet and provide age-appropriate activities that taught independence, responsibility, service to the community as well as personal life skills.

CFINW is guided by a volunteer board of eighteen and has eight full time staff led by Executive Director Steve Jurich. Notably, some of the staff have years of experience with the organization. They and the operations of CFINW are supported by as many as 75 part-time staff serving as counselors, activity specialists, operations specialists, and supervisors. In addition, CFINW relies on as many as 250 volunteers annually.

CFINW manages restricted funds and endowments of approximately \$2.9 million and other assets totaling in excess of \$1.1 million. SFCC reviewed prior year IRS Form 990’s from the tax years 2013 through 2016 and CFINW’s annual report for 2017 which revealed generally declining revenues and corresponding adjustments in operating expenses. The gap generally appears to have been fueled by a decline in contributions and grants since 2013.



In addition to providing limited in-school programming in Spokane, CFINW owns and operates Camp Sweyolakan, an overnight camp on Lake Coeur d'Alene, Idaho and Camp Dart-Lo, a day camp in North Spokane, both of which also host summer camps. Both are accredited by the American Camp Association.

Camp Sweyolakan

Camp Sweyolakan is a 300 acre camp on Lake Coeur d'Alene's Mica Bay. Its mission is to extend of Camp Fire's educational and recreational programs into nature. Activities include hiking, boating, swimming, archery, science projects, fishing, forestry, outdoor skills and challenge courses. It is both unique and limited because it is only accessible by boat and primarily operates during the summer months. Camp Fire programming is provided by thirty counselors, activity specialists, operations specialists, and supervisors. It is intended to enable campers and participants to develop strong character, values and life skills along enriched with a love of nature. Age-appropriate programs are offered for kids in 1st through 12th grade. Camp Sweyolakan offers several options throughout the summer including six week-long sessions. For high school juniors and seniors, CFINW offers a Youth Leadership Program intended to develop leadership skills. It also offers several limited opportunities for families to camp together through the summer as well.

Camp Dart-Lo

Camp Dart-Lo is a day camp Located on 51 acres along the Little Spokane River in north Spokane that was first opened in 1945. It is available for kids from Pre K through 12th grade. As with Camp Sweyolakan, Camp Dart-Lo engages youth through age-appropriate activities including swimming, team-building, leadership, environmental education, archery, and much more. In addition, CFINW supplements program with other fee based enrichment activities. To increase convenience for families, CFINW does offer transportation options to and from camp from select locations in Spokane and the Spokane Valley. To supplement revenue, Camp Dart-Lo is periodically rented evenings and weekends for private events.

The main lodge at Camp Dart-Lo was built in 1947. It is currently undergoing a significant \$370,000 renovation project. CFINW is actively raising funds through a capital campaign having raised \$354,000 to date including both private donations and grants including, significantly, \$131,000 from the M.J. Murdock Charitable Trust, \$60,000 from the Harriet Cheney Cowles Foundation, \$20,000 from Innovia Foundation and \$5,000 from Spokane Kiwanis Charities Foundation.

Camp Fire Club

CFINW's Club program is a volunteer-led small group opportunity for kids during out-of-school time. Currently, CFINW offers Clubs at ten locations in Spokane and one in both Cheney and Newport, Washington. The Club program leverages Camp Fire curriculum. Additional enrichment opportunities include field trips and community service projects that build both character, team building and leadership skills. Clubs are

designed for kids ages 3 through 18. Clubs. Its clubs currently are located mostly throughout Spokane, Post Falls and Coeur d'Alene with others in Republic, Athol and Bonner's Ferry. Programming for each level is designed to be age appropriate and focuses on five areas or Trails:

- Trail to Knowing Me
- Trail to Family and Community
- Trail to Creativity
- Trail to the Environment
- Trail to the Future

The following represents reported participation in CFINW's various programs for 2017.

Traditional Camp	654
You & Me Kid (Family Camp)	106
Outbacker's Day Camp	54
Day Campers	681
Club	81

Table 1 CFINW 2017 Enrollment

CFINW provided \$93,774 in scholarships to 267 participants in its fee-based programs.

Demographics

As noted in the scoping section, this Market Opportunity Analysis is constrained to Kootenai County, Idaho and Spokane County, Washington. Both counties have seen only very nominal population growth in the last decade experiencing annualized growth rates of 2.5 percent and 1.7 percent respectively in the last reported year. Kootenai County has experienced a higher rate of population growth at nearly 14 percent over that period but in real numbers that only represents an increase of 18,781 residents. Spokane County has grown over the same period by 7 percent adding 34,146 residents.

Population Estimate (as of July 1)

	2010	2015	2016	2017
Kootenai County	138,856	149,414	153,144	157,637
Spokane County	472,006	488,899	497,437	506,152

Table 2 2012-2016 American Community Survey 5-Year Estimates

Households with One or More People Under 18 Years of Age

	Kootenai County	Spokane County
	Estimate	Estimate
Total:	34,752	108,630
In family households:	34,543	107,497
In married-couple family	24,161	75,124
In male householder, no wife present, family	2,716	8,871
In female householder, no husband present, family	7,666	23,502
In nonfamily households	209	1,133

Table 3 2012-2016 American Community Survey 5-Year Estimates

Kootenai County

Kootenai County is the third-most populous county in Idaho. Coeur d'Alene is its county seat and largest town. The county was established in 1864 and named after the Kootenai tribe. Its primary feature is Lake Coeur d'Alene with over 109 miles of shoreline and a length of 25 miles.

In addition to eight unincorporated communities, its towns include the following:

Athol	Hauser	Rathdrum
Coeur d'Alene	Hayden	Spirit Lake
Dalton Gardens	Hayden Lake	Stateline
Fernan Lake Village	Huetter	Worley
Harrison	Post Falls	

Kootenai County ranks second among all Idaho counties when it comes to overall gross domestic product growth over the last three years according to a 2017 study by SmartAsset. Idaho, as a whole, has an unemployment rate of 2.9 percent, an historic low, while Kootenai County mirrors that rate reflecting a stable overall job front. Health care has been the largest and fastest growing industry in the county over the past ten years now employing more than 9,500 individuals. Kootenai Medical Center is the county’s largest private employer. Meanwhile, the leisure and hospitality sector accounts for nearly 11,000 employees. Hagadone Hospitality Co., its holdings such as the Coeur d’Alene Resort and the Coeur d’Alene Casino/Resort Hotel, as well as the Northern Quest Resort and Casino and Schweitzer Mountain Resort are among the county’s largest employers in that sector. Public sector employment accounts for another 11,000 jobs in the county according to the Bureau for Labor Statistics.

Spokane County

Spokane County was originally formed on January 29, 1858 and rechartered on October 30, 1879 after briefly being annexed by Stevens County. As of 2016, with a total population of 485,859, it was the fourth most populous county in the state of Washington. Its largest city is Spokane, its county seat. Spokane is the second largest city in the state behind only Seattle.

Spokane County is part of the Spokane-Spokane Valley Metropolitan Statistical Area, which is also part of the greater Spokane-Coeur d’Alene Combined Statistical Area that includes Kootenai County adjacent. It includes areas such as Airway Heights, Spokane, Spokane Valley, Cheney, Liberty Lake, and Green Bluff. In addition to fifteen unincorporated communities, Spokane County includes the following:

Airway Heights	Latah	Rockford
Cheney	Liberty Lake	Spangle
Deer Park	Medical Lake	Spokane
Fairfield	Millwood	Spokane Valley
		Waverly

Spokane and the surrounding region were long known for manufacturing and mining. Mining, forestry and its ancillary services, as well as agribusiness still have a significant impact on the area’s economy but the manufacturing sector began declining in 1980. The metro has worked to develop other industries in order to diversify its economic base but it still faces challenges. Emerging sectors include high-tech, biotechnology, and aerospace.

Job growth was projected at 2% in 2016 but overall employment numbers have continued a downward trend since 2016. While the State of Washington’s unemployment rate is currently near record lows of 4.7 percent, Spokane and the Spokane Valley surpass that at 5.1 percent. In addition to having slightly higher unemployment numbers, the Bureau of Labor Statistics reports that hourly wages are significantly below national averages on a peer basis.

The metro area is home to Kaiser Aluminum, Fortune 1000 companies Potlatch Corporation, Itron, and Avista Corporation. Other leading employers include Fairchild Air Force Base, home of the 92d Air Refueling Wing, Providence Healthcare, the State of Washington, Spokane County, and the various institutes of higher education and school districts.

Often a stabilizing force in local economies, Spokane is home to a number of institutions of higher education. They include the private universities Gonzaga, recognized for their basketball team and their law school among other things, and Whitworth. There are several public colleges including the Community Colleges of Spokane System. Eastern Washington University operates a satellite campus at the Riverpoint Campus. Bolstering the area’s healthcare and biotech sectors, Washington State University’s College of Nursing, College of Pharmacy, and Elson S. Floyd College of Medicine are all located in the area along with the University of Washington's medical school affiliated with a four-state cooperative program called WWAMI Regional Medical Education Program which is intended to bring advanced medical care to more rural areas of the Pacific Northwest. This is further enhanced by the location of six hospitals in Spokane County.

Household Income and Cost of Living

Understanding household income and, separately, cost of living helps us determine the space where opportunities might exist for a sustainable fee-for-service afterschool model. Need and demand aside, households must be able to either afford afterschool care or they must rely on free programs or in the alternative some form of familial care if anything at all. Wages are generally lower in both Kootenai and Spokane Counties than the national average yet as we see below, the overall cost of living is comparable to the national average. This suggests, generally, that a sustainable fee-for-service afterschool model must be carefully targeted based on these two indicators.

According to the U.S. Census Bureau, in 2016, the most recent year available, median family income (MFI) for both Kootenai County and Spokane County fell below U.S. MFI in every category but one. Families in Kootenai County with kids under 18 in the home have an MFI of 82% of the national average while male householders with kids under 18 at home have an MFI of only 79%. Female householders have an MFI comparable to the national average. However, their MFI is only 80% of their male counterparts and well below any other grouping. Spokane County fared somewhat better though still below equivalent national MFI.

Median Family Income in the Past 12 Months (2016 Inflation-Adjusted) By Family Type

	United States	Kootenai County	Spokane County
Total Median Family Income (MFI)	\$67,871	\$60,913	\$64,720
Married-couple family --	\$81,917	\$68,284	\$75,644
With own children of the householder under 18 years	\$87,757	\$71,598	\$78,743
No own children of the householder under 18 years	\$78,162	\$66,869	\$73,678

Other family --	\$36,518	\$32,245	\$34,509
Male householder, no wife present --	\$46,401	\$35,163	\$40,250
With own children of the householder under 18 years	\$39,618	\$31,299	\$32,398
No own children of the householder under 18 years	\$53,570	\$38,929	\$50,998
Female householder, no husband present --	\$32,955	\$31,584	\$32,163
With own children of the householder under 18 years	\$25,130	\$25,089	\$25,767
No own children of the householder under 18 years	\$44,636	\$47,601	\$45,781

Table 4 2012-2016 American Community Survey 5-Year Estimates

The percentage of households where both parents are in the workforce stood at 69 percent in Kootenai County and 68 percent in Spokane County. Available income aside, the high percentage of both parents in the workforce typically underscores the need for out-of-school care of some form.

As noted above, the confluence of income and cost of living plays a significant role in household decision making. While the need for afterschool care and summer programming is often clear, families having the resources to pay for such opportunities is entirely different. Numerous models with different methodologies can be used to estimate cost of living. The Cost of Living Index attempts to compare relative price levels for consumer goods and services in participating communities. The average for all participating places, both metropolitan and nonmetropolitan, equals 100. Areas below the average experience lower costs of living; those above the median suggest more expensive.

According to the Cost of Living Index (COLI) produced by C2ER, Spokane County's composite index was 94 for the first half of 2018, well below the statewide average of 121. It should be noted that the statewide average for Washington is heavily influenced by the Seattle-Tacoma-Bellevue market with an overall COLI of 142. Meanwhile, Kootenai County's COLI was significantly higher than Idaho's composite index and either at or above the national average for every major measurement.

	Cost of Living Index			
	Spokane County	Washington	Kootenai County	Idaho
Overall	94	121	105	95
Grocery	96.3	103.8	101	95.1
Health	107	113	106	94
Housing	84	157	114	93
Utilities	91	88	94	94
Transportation	99	105	106	98
Miscellaneous	101	103	98	97
Median Home Cost	\$ 192,500	\$ 370,000	\$ 284,500	\$ 217,800

Table 5 Cost of Living Index C2ER

When considering cost of living, another key component is the cost of housing or the housing burden. Housing and transportation costs dominate household spending comprising 54 percent of every dollar spent by renters and 48 percent spent by homeowners nationwide. The most common method of measuring affordability is by calculating a household's total monthly housing costs including utilities against pre-tax income to see if the ratio surpasses 30 percent, the current threshold for most federal housing programs.

A severe housing cost burden occurs when a family spends more than half of their income on housing costs alone. According to *Housing Landscape 2016* published by the Center for Housing Policy, from 2011 to 2014, those households in Idaho experiencing a severe housing burden fell from 20.3 percent to 15.6 percent while those experiencing a severe housing burden in Washington fell from 21.5 percent to 18.5 percent. In both, cases these rates were below the national average of 20.9 percent. Renters tend to have a greater housing burden proportionately than do homeowners as evidenced in Table 6 below.

The following table considers those households by school district whose housing burden is either moderate (30 percent to 35 percent) or severe (35 percent or more). With relatively few households who own homes experiencing a severe housing burden in the study area, this demographic would be the most attractive for a fee-for-service model based on this one metric alone.

On the other hand, those households who rent would be better served by a subsidized or free program. Several Camp Fire councils have initiated programs in partnership with multifamily management operations in their service area to provide onsite services to apartment communities. Given that CFINW is considering both Mead and Spokane Public School Districts for partnership programs rather than exclusively for fee-for-service programs, this may be an attractive opportunity beyond schools.

	Housing Burden			
	Homeowners		Renters	
	Moderately Burdened	Severely Burdened	Moderately Burdened	Severely Burdened
Kootenai County				
Coeur d'Alene School District 271	8.1%	15.2%	7.30%	41.40%
Kootenai Joint School District 274	10.6%	12.4%	9.20%	24.40%
Lakeland Joint School District 272	8.2%	17.5%	16.60%	38.10%
Post Falls School District 273	8.2%	17.9%	5.90%	41.10%
Plummer-Worley Joint School District 44	4.6%	12.5%	8.00%	40.10%
Shoshone Joint School District 312	11.1%	17.3%	16.80%	30.40%
Spokane County Select				
Mead School District	9.1%	14.8%	14.30%	40.10%
Spokane Public Schools	7.9%	17.5%	8.70%	44.80%

Table 6 2012-2016 American Community Survey 5-Year Estimates

Market Analysis

To determine the potential opportunity for CFINW, in-depth analyses of the community school districts within the market area was conducted. This informs as to the number, location, economic and familial status of kids who might be willing and or able to participate in CFINW programming.

Beyond schools, SFCC reviewed other types of programming offered to kids throughout the study area to identify:

- Direct competitors;
- Types of programming offered;
- Geographic dispersal of programming; and
- Cost for participation.

Kootenai County accounts for all or part of five public school districts while Spokane County contains all or part of sixteen school districts. These include districts that are on Indian reservations.

Area School Districts

Kootenai County	Spokane County	
Coeur D’Alene	Cheney	Nine Mile Falls
Kootenai	Deer Park	Orchard Prairie
Lakeland	East Valley	Reardan-Edwall
Post Falls	Freeman	Riverside
Shoshone	Liberty	Rosalia
	Mead*	Spokane*
	Medical Lake	St. John
	Newport	Tekoa
	West Valley	

Table 7 Area School Districts

Per the revised scope of this report, of those school districts in Spokane County, only the Mead and Spokane School Districts are a part of this study while all in Kootenai County are.

Demand for Afterschool Programs

“School-aged children require care and supervision before and after school and during school vacations. Schools, out-of-school care providers, and employers can ease work-family conflicts by taking account of changes in working families,” according to the Future of Children. With more parents in the workforce, the need for afterschool options exists. The Afterschool Alliance has provided extensive research on this. While both states have good participation rates in afterschool programs, some of the discrepancy revealed below between Idaho and Washington can be attributed to a significantly higher percentage of Washington youth enrolled in afterschool programs. However, in both states, parents feel strongly about afterschool programs.

There is great value in providing programming to other age ranges and the findings that follow in this analysis do not intend to suggest any curtailment. The WoHeLo underpinnings of Camp Fire and its programming are incredibly valuable for youth at any age. Were the allocation of CFINW resources not an issue, need coupled with challenges faced within the study area certainly suggest that the WoHeLo philosophy could bring great value to a much wider audience.

Program Content

This market study focuses on those afterschool programs licensed by the both Idaho and Washington. Afterschool programming and quality of its content vary between providers for any of a number of reasons. However, our sampling indicates that school based programs focus on childhood education and enrichment including STEM. Some non-school based programs may focus more on recreation and creative pastimes. According to the Afterschool Alliance's report, *America After 3PM*, what matters most to parents as it pertains to afterschool programs is that:

- It is a safe haven;
- Their child enjoys the afterschool program;
- Staff is knowledgeable and well-trained;
- Location is convenient; and
- The hours meet parents' needs.

To attract kids and parents, CFINW should continue promoting and leveraging the strength of Camp Fire programming and the organization's core values. External and internal data already support the quality of program and the impact that CFINW delivers. Studies suggest that parents seek enrichment options that go beyond their kids' school campus. Leveraging Camp Dart-Lo, in particular, as well as other strategic partnerships may provide such enhanced opportunities particularly for environmental and fire-wise education as well as leadership development. In doing so, this creates space for CFINW to align further with both states' adopted Common Core standards for science that, in turn, enhances CFINW's value proposition to the school districts.

Kootenai County Districts

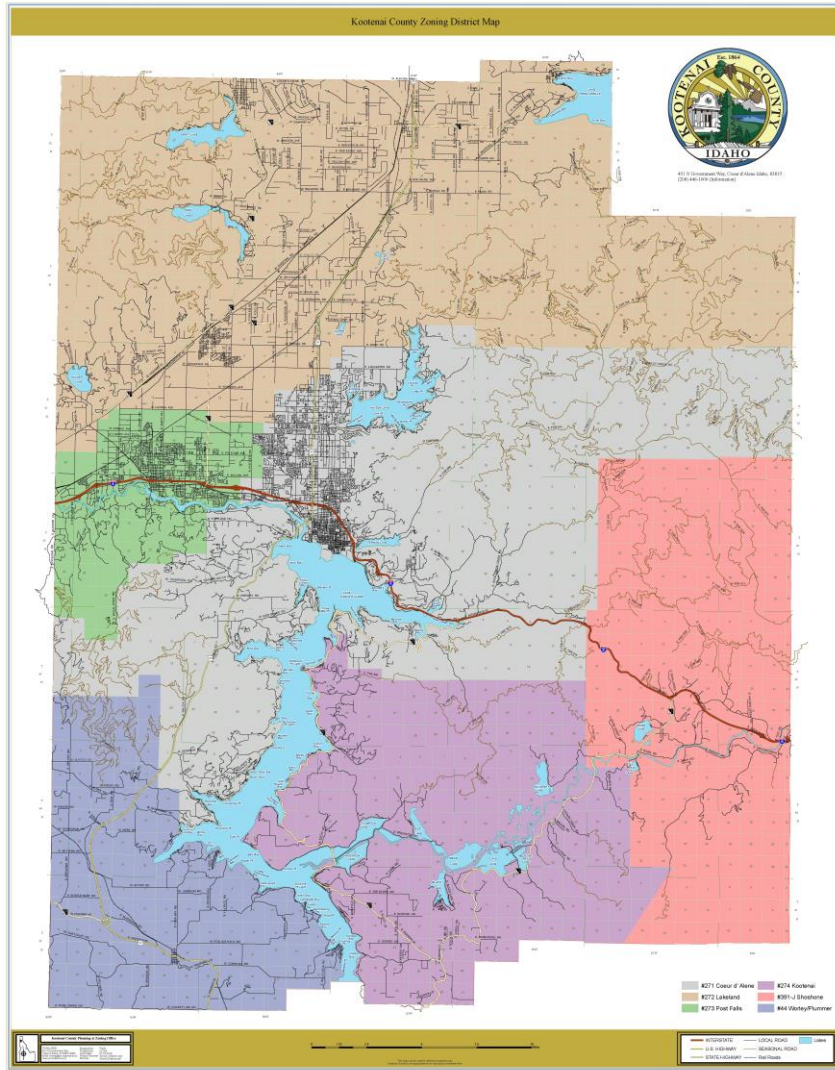


Figure 2 School District Map of Kootenai County

Nearly 22,000 youth attend Pre K through 12th grade in the Kootenai County school districts and approximately 12,000 are in Pre-K through 6th Grade. Students attend 26 elementary schools, 8 middle schools and 12 high schools.

Kootenai County School Age Enrollment

	PreK	K	1	2	3	4	5	6	Total	7	8	9	10	11	12
Coeur D'Alene District															
Atlas ES	25	92	81	101	104	95	117	-	615	-	-	-	-	-	-
Borah ES	62	70	62	54	55	59	54	-	416	-	-	-	-	-	-
Bryan ES	-	72	63	88	54	51	80	-	408	-	-	-	-	-	-
Dalton ES	1	46	59	76	86	89	93	-	450	-	-	-	-	-	-
Fernan Stem Academy	37	69	68	68	70	48	65	-	425	-	-	-	-	-	-

Hayden Meadows ES	-	67	85	78	83	115	107	-	535	-	-	-	-	-	-
Northwest Academy	-	36	47	52	58	48	22	-	263	-	-	-	-	-	-
Ramsey Magnet	-	77	113	129	146	122	143	-	730	-	-	-	-	-	-
Skyway ES	-	75	100	89	113	119	103	-	599	-	-	-	-	-	-
Sorensen Magnet	-	50	46	52	52	59	59	21	339	-	-	-	-	-	-
Winton ES	-	90	68	89	82	90	59	-	478	-	-	-	-	-	-
Canfield MS	-	-	-	-	-	-	-	270	270	277	257	-	-	-	-
Lakes Magnet	-	-	-	-	-	-	-	211	211	205	211	-	-	-	-
Woodland MS	-	-	-	-	-	-	-	274	274	286	303	-	-	-	-
Coeur D'Alene HS	-	-	-	-	-	-	-	-	-	-	-	378	358	332	349
Lake City HS	-	-	-	-	-	-	-	-	-	-	-	497	433	406	353
Venture HS	-	-	-	-	-	-	-	-	-	-	-	7	37	55	39
CDA Juvenile DC	-	-	-	-	-	-	-	-	-	2	1	7	9	13	8
Totals	125	744	792	876	903	895	902	776	6,013	770	772	889	837	806	749

Lakeland District

Betty Kiefer ES	-	53	73	59	53	71	60	58	427	-	-	-	-	-	-
Spirit Lake ES	1	35	44	47	48	54	52	54	335	-	-	-	-	-	-
John Brown ES	1	40	52	59	66	48	43	49	358	-	-	-	-	-	-
Athol ES	1	55	44	46	42	61	59	45	353	-	-	-	-	-	-
Garwood ES	-	47	49	57	47	66	67	62	395	-	-	-	-	-	-
Twin Lakes ES	15	34	47	40	47	44	49	48	324	-	-	-	-	-	-
Lakeland MS	-	-	-	-	-	-	-	-	-	175	208	-	-	-	-
Timberlake MS	-	-	-	-	-	-	-	-	-	146	155	-	-	-	-
Lakeland Senior HS	-	-	-	-	-	-	-	-	-	-	-	216	228	210	201
Timberlake Senior HS	-	-	-	-	-	-	-	-	-	-	-	156	168	135	107
Mountainview Alt.	-	-	-	-	-	-	-	-	-	-	-	9	13	20	32
Totals	18	264	309	308	303	344	330	316	2,192	321	363	381	409	365	340

Post Falls District

Frederick Post Kinder	-	413	-	-	-	-	-	-	413	-	-	-	-	-	-
Greensferry ES	-	-	73	71	76	63	81	-	364	-	-	-	-	-	-
Mullan Trail ES	56	-	67	71	51	68	80	-	393	-	-	-	-	-	-
Ponderosa ES	-	-	94	82	91	91	88	-	446	-	-	-	-	-	-
Prairie View ES	-	-	81	95	89	83	96	-	444	-	-	-	-	-	-
Seltice ES	17	-	57	66	75	50	71	-	336	-	-	-	-	-	-
West Ridge ES	-	-	81	74	97	90	108	-	450	-	-	-	-	-	-
Post Falls MS	-	-	-	-	-	-	-	250	250	246	248	-	-	-	-
River City MS	-	-	-	-	-	-	-	182	182	215	202	-	-	-	-
New Vision HS	-	-	-	-	-	-	-	-	-	-	-	6	27	44	74
Post Falls HS	-	-	-	-	-	-	-	-	-	-	-	500	338	377	342
Totals	73	413	453	459	479	445	524	432	3,278	461	450	506	365	421	416

Kootenai District

Harrison ES	2	6	14	7	10	10	9	-	58	-	-	-	-	-	-
Kootenai Jr/Sr HS	-	-	-	-	-	-	-	9	9	6	16	14	10	9	17
Totals	2	6	14	7	10	10	9	9	67	6	16	14	10	9	17
Shoshone Joint District															
Shoshone ES	1	38	39	39	40	43	41	-	241	-	-	-	-	-	-
Shoshone MS	-	-	-	-	-	-	-	40	40	37	48	-	-	-	-
Shoshone HS	-	-	-	-	-	-	-	-	-	-	-	27	41	33	39
High Desert	-	-	-	-	-	-	-	-	-	-	-	-	3	7	4
Totals	1	38	39	39	40	43	41	40	281	37	48	27	44	40	43

Table 8 Idaho Department of Education 2017-18 Certified Enrollment

The Idaho Department of Health and Welfare partners with local health districts and communities to coordinate childcare rules and licensing. For example, Coeur d’Alene has a Child Care Commission that monitors licensing requirements. However, no other community in the county has anything similar. Hayden requires proof of a state issued license while Harrison and Post Falls just require a business license. Consequently, having centralized data becomes problematic.

From our research and calls to various state agencies, the State of Idaho does not track licensed capacity a most other states do. Consequently, there is no data available to determine either enrollment in or capacity of afterschool programs at each campus and in each community. As explained by Health and Welfare staff, any program’s capacity is determined solely by a staff to child ratio.

The majority of school districts in Kootenai County offer their own district-run afterschool programs. Those are supplemented by the Boys & Girls Club of Kootenai County at its two facilities in Coeur d’Alene and Post Falls. In 2017, it reported serving 6,356 youth and 425 daily during the school year. Approximately 65 percent of its participants were elementary school age.

CDA4Kids and Club240 After School Programs are also offered for elementary and middle school-aged kids at Atlas, Borah, and Fernan Elementary, Canfield, Lakes, and Woodland Middle Schools, and Venture High School. This 21st Century Community Learning Centers grant funded program intended particularly to support low performing schools by providing academic enrichment opportunities for kids outside of regular class time is in peril. The current administration has zeroed out the budget for this item.

As a cautionary note, as late as 1995, YMCA operated Post Falls afterschool programs but low year-round participation in the YMCA programs resulted in the closing of its Coeur d’Alene facility. At the time, YMCA of the Inland Empire had to heavily subsidize its programs in Kootenai County.

Coeur d’Alene School District

Coeur d’Alene School District offers its own afterschool and summer program called School PLUS for grades K through 6th grade. It is a fee-for-service and reportedly self-

sustaining program offered in all public elementary schools in the District as well as Kinder PLUS at the Church of the Nazarene. The School PLUS program runs from 3:30 to 6:00 during the school week. It is not an extension of the academic day and doesn't provide educational services. It appears more focused on creativity and activity. Using findings in other school districts around the country, it is reasonable to estimate that the program's capacity may be limited to fewer than 500 kids. With more than 6,000 kids in K through 6th Grade, Coeur d'Alene has the greatest potential market to draw from of any of the districts in Kootenai County.

For its afterschool programs, there is a registration fee of \$30 for the first child and \$40 for a family. Its fee structure is outlined below and varies by the number of days per week the service is utilized. There are certain surcharges that may occur in addition to supplemental fees for field trips and other activities.

Coeur D'Alene Monthly Fees		
	One Child	Each Add'l
5 days per week	\$152	\$139
4 days per week	\$139	\$124
3 days per week	\$106	\$94
2 days per week	\$75	\$64

Table 9 2018-2019 Coeur d'Alene School Year Childcare Program Fees

It should be noted that according to the School PLUS website, they are at licensed capacity and are not accepting new participants. This underscores demand as well as the opportunity for supplemental programs like CFINW that would provide additional licensed capacity. The limitation would be the lack of available space on each campus for CFINW to provide services. This in turn would necessitate CFINW identifying a potential partner that might fulfill that need.

One such partner might be the Coeur d'Alene Parks Department. Research has shown that parents want high quality afterschool that can extend beyond the school campus. Coeur d'Alene and the surrounding areas have a number of parks and recreational facilities that are proximate to elementary schools. Perhaps more notable for such an opportunity are the 165 acre Tubbs Hill Natural Area and the 24 acre Canfield Mountain Natural Area. There is also the Centennial Trail which is proximate to a couple of school districts. These are far more accessible to more kids in the area than Camp Sweyolakan. While the Parks Department offers a wealth of recreational programs, none appear to offer the level of enrichment, development and certainly environmental education and stewardship that CFINW does. Developing a hybrid program that partners with both the School District and the Parks Department might create a niche that bridges the two.

Post Falls School District

The Post Falls School District operates its own program called the GAP Childcare Program for kids K through 5th grade. According to the district's website, it is entirely funded by enrollment fees. It operates from 3:30 to 6:00 in each of the district's

elementary schools. GAP provides both educational and recreational programs. Its registration fee is \$30 for the first child and \$50 for the family.

Post Falls Monthly Fees

5 days per week	\$195
4 days per week	\$156
3 days per week	\$117
2 days per week	\$ 78

Table 10 Post Falls School District Gap Program Fees

Lakeland School District

The Lakeland School District operates its afterschool program called BASE, an acronym for Before and After School Enrichment. The program provides before and after school programming at each of its elementary schools from 3:00 to 6:00. BASE includes both educational and recreational components. Lakeland partners with both the Community Library Network and the University of Idaho Extension to provide additional enrichment. Registration fees are \$30 per child or \$50 per family.

Lakeland Monthly Fees

	One Child	Each Add'l
5 days per week	\$ 149	\$ 139
4 days per week	\$ 132	\$ 122
3 days per week	\$ 110	\$ 100
2 days per week	\$ 83	\$ 73

Table 11 Lakeland Joint School District 2018-2019 BASE Rates

Neither the Shoshone Joint District nor the Kootenai School District provide before or afterschool programs.

Market Analysis for Afterschool Fee-For-Service in Kootenai County

According to the Afterschool Alliance, Idaho parents are very supportive of afterschool programs. 83 percent support *public funding* for afterschool, 62 percent say afterschool helps them keep their jobs, 54 percent say afterschool excites kids about learning, and 69 percent say afterschool reduces the likelihood that kids will engage in risky behavior. Its research suggests that for every Idaho student in afterschool, five more would participate if a program were available.

Type of Afterschool Care in Idaho

% of Kids in Afterschool Programs	8%
% of Kids Likely to Participate in Afterschool	37%
% of Kids in Self Care	18%
% of Kids in Care of Family/Other	37%

Table 12 America after 3PM, Afterschool Alliance

Table 12 above suggests that a small percentage of kids currently participate in afterschool in Idaho but that a much higher percentage would if the opportunity were available. If resources were not an issue for either CFINW or for parents, it is abundantly

evident that there would be plenty of kids to fill programs. For the purposes of this report however, only a self-sustaining fee-for-service model is being considered for Kootenai County. With that framing this analysis, the universe of prospective participants becomes much more finite.

Families who are not economically disadvantaged are considered more likely to embrace a fee-for-service model because they may have more disposable income. To consider what schools might present the best opportunity for a fee-for-service model, the percentage of kids who participate in free or reduced price lunch programs at each campus offers a good benchmark. Table 13 below ranks each school accordingly. Based on this metric alone, the schools that present the *best* opportunity for a self-sustaining fee-for-service afterschool program include Dalton, Sorensen, Hayden Meadows and Garwood. This assumes that these districts would either allow a partner to provide services on site or that proximate off-site facilities might be available for CFINW programs.

Elementary Schools Ranked by % of Free & Reduced Price Meals

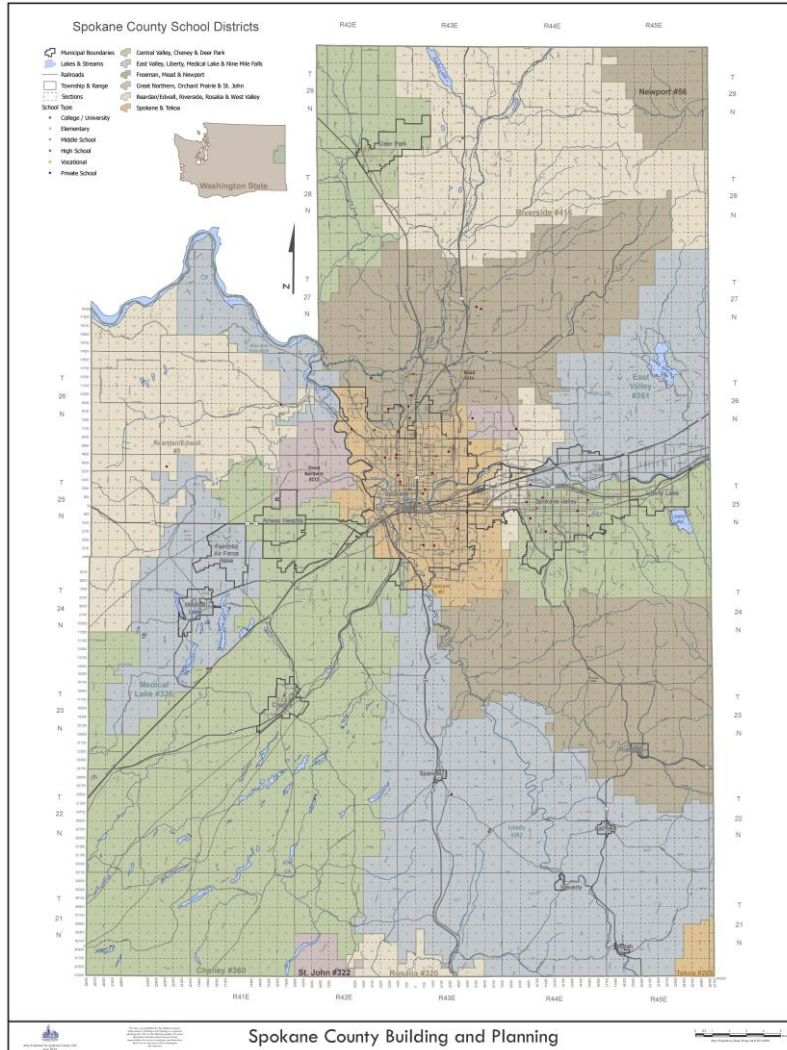
Coeur d'Alene School District		Lakeland School District		Post Falls School District	
Dalton ES	16.11%	Garwood ES	30.96%	Greensferry ES	35.37%
Sorensen Magnet School	25.88%	Twin Lakes ES	36.45%	Prairie View ES	42.66%
Hayden Meadows ES	28.46%	Betty Kiefer ES	39.91%	Frederick Post Kinder	42.20%
Skyway ES	34.75%	Athol ES	45.45%	West Ridge ES	46.71%
Ramsey Magnet School Of Science	37.40%	John Brown ES	60.22%	Mullan Trail ES	49.28%
Atlas ES	38.27%	Spirit Lake ES	62.11%	Seltice ES	52.34%
Northwest Expedition Academy	52.83%			Ponderosa ES	56.55%
Fernan Stem Academy	58.10%				
Bryan ES	61.84%			Kootenai School District	
Winton ES	66.11%			Harrison ES	64.41%
Borah ES	40%+				

Table 13 Idaho Lunch Eligibility Reports by District 2017/2018

Rates of free and reduced price meals cannot be used as the sole metric when determining where a self-sustaining fee-for-service afterschool program might be successful. Disposable income must also be considered. Our finding above that incomes across all households in Kootenai County are below median while cost of living is the same or higher than state and national averages suggests that there is less disposable income for childcare even if families don't meet poverty guidelines.

Conclusion

- The economics of Kootenai County don't offer strong support for expansion of a self-sufficient fee-for-service afterschool program.
- Given CFINW's declining revenue, which may be momentary, an extension of service is not in the organization's best interest at this time.
- There are kids that are not being served in Kootenai County either by their respective school districts or by other organizations in their communities suggesting that there is a gap in service that needs to be filled though it would require external support.
- There is no indication that any of the high quality programming offered by Camp Fire, particularly as it pertains to environmental and fire-wise education, is widely available. This represents an opportunity for CFINW.
- Working in concert with another organization to supplement existing programs or partnering with the Coeur d'Alene Parks Department or perhaps University of Idaho Coeur d'Alene might represent an interim opportunity to grow CFINW's presence and visibility.
- Camp Sweyolakan is challenged by accessibility so expanding youth opportunities faces a significant barrier. Seeking out other organizations who might be able to utilize the facilities during non-peak seasons can provide a source of revenue without the burden of retaining significant staff. Examples might include:
 - Collaborating with the University of Idaho Coeur d'Alene Nonprofit Leadership Program to create a unique retreat opportunity for participants in their leadership programs;
 - Collaborating with the Idaho State Department Of Education's GEAR UP program (Gaining Early Awareness and Readiness for Undergraduate Programs for Grades 7 through 12) to provide opportunities to enrich their participants' development;
 - Collaborating with the Coeur d'Alene Kroc Center to provide occasional unique enrichment experiences for their existing participants in Grades 6 through 8; and
 - Collaborating with the Coeur d'Alene Chamber of Commerce by providing facilities and environmental awareness education to Leadership Coeur d'Alene and building on its Women Creating Success conference. This has the added benefit of placing CFINW in front of potential corporate sponsors.



Spokane County Select Districts

Spokane Public Schools

Spokane Public Schools (SPS) is the second largest school district in the state of Washington. There are thirty-five elementary schools, six middle schools and seven high schools. In addition, there are another fifteen charter or alternative schools not included in the table below.

School Name	PK	K	1	2	3	4	5	6	Total	7	8	9	10	11	12
Adams ES	2	55	62	46	50	51	46	51	306	-	-	-	-	-	-
Arlington ES	3	105	73	91	92	95	94	101	546	-	-	-	-	-	-
Audubon ES	2	63	46	51	53	67	59	56	332	-	-	-	-	-	-

Balboa ES	2	54	65	50	48	46	57	34	300	-	-	-	-	-	-
Bemiss ES	3	75	71	79	71	76	88	67	452	-	-	-	-	-	-
Browne ES	3	59	67	60	65	69	55	55	371	-	-	-	-	-	-
Cooper ES	7	71	75	74	72	77	81	62	441	-	-	-	-	-	-
Finch ES	1	65	71	84	84	90	77	64	470	-	-	-	-	-	-
Franklin ES	0	62	60	58	74	64	56	61	373	-	-	-	-	-	-
Garfield ES	2	74	70	60	68	49	79	45	371	-	-	-	-	-	-
Grant ES	6	62	54	56	56	46	49	46	307	-	-	-	-	-	-
Hamblen ES	2	68	72	66	93	81	73	66	451	-	-	-	-	-	-
Holmes ES	26	53	71	56	52	58	65	42	344	-	-	-	-	-	-
Hutton ES	2	85	84	74	83	97	84	83	505	-	-	-	-	-	-
Indian Trail ES	1	50	54	48	54	47	42	37	282	-	-	-	-	-	-
Jefferson ES	1	69	73	72	72	75	74	78	444	-	-	-	-	-	-
Lidgerwood ES	1	52	71	65	67	71	44	44	362	-	-	-	-	-	-
Lincoln Heights ES	11	72	80	55	62	76	78	80	431	-	-	-	-	-	-
Linwood ES	12	93	73	77	68	62	73	62	415	-	-	-	-	-	-
Logan ES	3	52	62	56	62	57	57	49	343	-	-	-	-	-	-
Longfellow ES	0	68	71	72	81	84	62	69	439	-	-	-	-	-	-
Madison ES	1	51	47	49	58	55	48	47	304	-	-	-	-	-	-
Moran Prairie ES	4	61	75	91	77	81	76	84	484	-	-	-	-	-	-
Mullan Road ES	3	98	89	122	100	99	79	88	577	-	-	-	-	-	-
Regal ES	19	74	74	59	63	64	72	63	395	-	-	-	-	-	-
Ridgeview ES	1	53	58	60	43	62	55	0	278	-	-	-	-	-	-
Roosevelt ES	15	75	69	66	77	77	75	62	426	-	-	-	-	-	-
Sheridan ES	24	69	68	68	47	70	67	69	389	-	-	-	-	-	-
Stevens ES	13	60	70	76	66	51	71	44	378	-	-	-	-	-	-
Westview ES	3	58	72	66	80	74	74	77	443	-	-	-	-	-	-
Whitman ES	1	73	78	81	83	88	84	74	488	-	-	-	-	-	-
Willard ES	4	76	85	70	76	77	71	75	454	-	-	-	-	-	-
Wilson ES	-	51	52	52	51	51	48	57	311	-	-	-	-	-	-
Woodridge ES	12	65	68	60	67	64	66	62	387	-	-	-	-	-	-
Chase MS	-	-	-	-	-	-	-	-	-	332	347	-	-	-	-
Garry MS	-	-	-	-	-	-	-	-	-	293	283	-	-	-	-
Glover MS	-	-	-	-	-	-	-	-	-	257	230	-	-	-	-
Sacajawea MS	-	-	-	-	-	-	-	-	-	393	395	-	-	-	-
Salk MS	-	-	-	-	-	-	-	75	75	327	298	-	-	-	-
Shaw MS	-	-	-	-	-	-	-	2	2	284	289	-	-	-	-
Ferris HS	-	-	-	-	-	-	-	-	-	-	-	461	456	430	462
Lewis & Clark HS	-	-	-	-	-	-	-	-	-	-	-	454	470	467	483
Libby Center	-	49	-	-	5	48	57	71	181	61	65	-	-	-	-
North Central HS	-	-	-	-	-	-	-	-	-	57	53	371	397	354	280
On Track Academy	-	-	-	-	-	-	-	-	-	-	-	1	14	57	219
Rogers HS	-	-	-	-	-	-	-	-	-	-	-	409	425	416	319
Shadle Park HS	-	-	-	-	-	-	-	-	-	-	-	345	330	337	333
Totals	190	2,320	2,330	2,270	2,320	2,399	2,336	2,202	16,322	2,004	1,960	2,041	2,092	2,061	2,096

Table 14 State of Washing Office of Public Instruction 2018 Enrollment Reports

SPS offers its own afterschool program called Express for grades K through 6th at sixteen of thirty-five elementary school campuses. Express experienced a significant decline in enrollment as a result of the recession but has been returning to pre-recession levels. That has not happened uniformly through the district however. Several schools bus students to neighboring elementary schools for afterschool programs and other schools no longer offer an afterschool program. This is typically due to one or more factors including under-enrollment, staffing capacity or lack of space.

In terms of staffing, the State of Washington changed requirements in 2017 for qualified site directors that made it harder for programs like Express to recruit individuals to staff sites. Exacerbating the challenge is that often, Express is limited by the availability of space in any given school. Older campuses don't have the types of multipurpose rooms that can meet the needs of an afterschool program. This might present an opportunity for increased utilization of Camp Dart-Lo particularly for schools in northern parts of Spokane provided transportation to the camp is not a barrier.

District facilities have a total licensed capacity for 1,310 kids but only 900 of those are utilized by Express that in turn represents only 5.5 percent of all K through 6th Grade enrollment in SPS elementary schools. CFINW is identified as a Class I Organization by SPS. Provided space is available, as appears to be the case at certain campuses, per district rules CFINW is exempt from paying for the use of district facilities during custodial hours.

SPS Facility Licensed Capacity and Utilization

School Name	Enrollment	Licensed Capacity	Capacity / Enrollment	Utilized Capacity	Unutilized Capacity
Served by Express					
Browne Elementary	433	45	10%	45	
Finch Elementary	536	90	17%	90	
Garfield Elementary	447	60	13%	60	
Hamblen Elementary	521	60	12%	60	
Hutton Elementary	592	60	10%	60	
Jefferson Elementary	514	60	12%	60	
Lidgerwood Elementary	415	30	7%	30	
Lincoln Heights Elementary	514	90	18%	90	
Longfellow Elementary	507	45	9%	45	
Moran Prairie Elementary	549	60	11%	60	
Mullan Road Elementary	678	60	9%	60	
Ridgeview Elementary	332	60	18%	60	
Roosevelt Elementary	516	60	12%	60	
Westview Elementary	504	60	12%	60	
Whitman Elementary	562	60	11%	60	
With licensed capacity but not served by Express					
Balboa Elementary	356	30	8%		30
Franklin Elementary	435	20	5%		20

Indian Trail Elementary	333	45	14%	45
Linwood Elementary	520	30	6%	30
Logan Elementary	398	30	8%	30
Madison Elementary	356	60	17%	60
Sheridan Elementary	482	30	6%	30
Stevens Elementary	451	30	7%	30
Willard Elementary	534	90	17%	90
Woodridge Elementary	466	45	10%	45
Transported to other campuses for Express				
Adams Elementary	363			
Arlington Elementary	654			
Audubon Elementary	397			
Bemiss Elementary	530			
Cooper Elementary	519			
Grant Elementary	375			
Holmes Elementary	423			
Regal Elementary	488			
Spokane Public Montessori	481			
Wilson Elementary	362			
Totals	16,543	1,310		900 410

Table 15 Licensed Capacity Analysis

Approximately 4,600 kids at ten elementary schools have access to and are provided with transportation to one of the schools offering Express. Ten of the campuses with an enrollment of 4,300 kids don't offer Express and aren't provided transported to other schools based on available data. Nearly 94 percent of SPS elementary aged students don't have access to the district's Express program. With only a small percentage of kids currently served and the table above suggesting that 31 percent would participate if afterschool programs were an option, this certainly suggests a significant opportunity to grow well beyond the 130 kids currently served in SPS schools by CFINW.

SPS partners with many service providers that offer the following.

SPS Community Partnerships

T-2-4	Tutoring and Homework Help
Mentoring	Basic Needs
Family and Student Support	Cultural Enrichment
Physical Activities	Express Partner
Youth Development	Tutoring and Homework Help
Academic or STEM	Basic Needs
Enrichment	

Table 16 Spokane Public Schools School Community Partnerships 3/16

Youth Development is the only classification above where CFINW was identified by SPS. Being identified as a provider of Physical Activities, Cultural Enrichment and

particularly as an Express Partner could increase opportunities within the District. Express currently participates with the following third party providers.

- Boy Scouts of America Inland Northwest Council
- Girl Scouts of Eastern Washington and Northern Idaho
- Gonzaga University Center for Community Action & Service Learning
- Washington State University Extension - Master Gardeners
- Washington State University Extension 4-H YA4H

The opportunity that CFINW is presented with is that its services and programs integrate seamlessly with SPS’s 2014-2020 Strategic Plan that encourages the engagement of community partnerships to assist in preparing each student to succeed. One of the Strategic Plan’s core values is to provide a variety of learning environments, educational options, and instructional techniques creates a setting where all students can succeed. Its Strategic Goal I is to increase student achievement whose pertinent objectives are to:

- 3. Increase the quality of District primary grade offerings and coordinate with area preschool providers to improve student readiness;
- 4. Provide a variety of extra-curricular and co-curricular activities for students across all grade levels;
- 5. Expand the range of and access to educational options, particularly at the secondary level; and
- 11. Develop within students a strong work ethic, behavior, and citizenship that will lead to success later in life.

SPS responds to this with Express and by offering programs focusing in the areas of academic enrichment, STEM, arts and music and athletics. Summer STEM & Arts Camps are open to all students in grades K-8 in the Eastern Washington region. However, it doesn’t provide the enrichment activities offered by Camp Fire.

Notably absent are any options for environmental education or leadership development. It is here that CFINW might have the greatest opportunity to provide enrichment for area youth. Given the spread and intensification of wildfires in the Pacific Northwest, among other things, the subject becomes even more impactful. The Office of Superintendent of Public Instruction for the State of Washington produced a report in December of 2007 entitled *Environmental Education Report Empirical Evidence, Exemplary Models, and Recommendations on the Impact of Environmental Education on K-12 Students*. This report highlights the need for such programming as well as its justification. While it is somewhat dated, the findings are still very relevant.

SPS charges a \$50 per child registration fee. There are multiple child discounts available. Admission is contingent on space availability.

SPS Monthly Fees			
Days /Week	AM (6:30-8:30)	PM (3:00-6:00)	Full Time (both)

5	\$262.00	\$294.00	\$493.00
4	\$225.00	\$255.00	\$424.00
3	\$208.00	\$235.00	\$390.00

Table 17 SPS Express Fee Structure

These one and two week camps are only held at Chase and Salk Middle Schools and are \$90 per week.

Mead Public Schools

Mead Public Schools (MPS) is a much smaller district located immediately north of Spokane and near Camp Dart-Lo. For that reason alone, a partnership with the district is attractive because of CFINW’s ability to leverage the camp for educational purposes more frequently.

MPS would classify CFINW in their facilities use policy in Group IA - Non-Profit Youth Groups that includes organizations such as Boy Scouts, Girl Scouts, 4-H Clubs, SYSA and YMCA. MPS’ facilities policy states that “priority shall be given to school district sponsored events and those community youth organizations that have the highest percentage of students enrolled in Mead School District.” For organizations like CFINW seeking space within the schools to provide programs, this policy puts them at an inherent disadvantage given YMCA’s role as MSP’s afterschool provider.

Mead Public School Enrollment

School Name	PK	K	1	2	3	4	5	6	Total	7	8	9	10	11	12
Mead Education PP	-	-	41	34	34	23	39	30	201	44	42	31	34	46	42
Mead PreSchool	83	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Brentwood ES	1	77	72	70	99	79	87	89	496	-	-	-	-	-	-
Colbert ES	32	60	70	49	79	73	90	86	447	-	-	-	-	-	-
Evergreen ES	1	76	89	93	86	86	90	89	533	-	-	-	-	-	-
Farwell ES	-	99	87	89	75	78	89	89	507	-	-	-	-	-	-
Meadow Ridge ES	34	60	64	71	88	88	93	93	497	-	-	-	-	-	-
Midway ES	-	76	84	84	92	89	88	91	528	-	-	-	-	-	-
Prairie View ES	2	84	96	116	119	125	119	-	575	-	-	-	-	-	-
Shiloh Hills ES	2	78	79	72	78	73	84	89	475	-	-	-	-	-	-
Mountainside MS	-	-	-	-	-	-	-	-	-	355	372	-	-	-	-
Northwood MS	-	-	-	-	-	-	-	111	111	414	392	-	-	-	-
Riverpoint Academy	-	-	-	-	-	-	-	-	-	-	-	48	50	44	29
Mead HS	-	-	-	-	-	-	-	-	-	-	-	388	401	403	442
Mt Spokane HS	-	-	-	-	-	-	-	-	-	-	-	411	403	367	396
Mead Alternative HS	-	-	-	-	-	-	-	-	-	-	-	1	15	25	43
Totals	155	610	682	678	750	714	779	767	4,370	813	806	879	903	885	952

Table 18 State of Washing Office of Public Instruction 2018 Enrollment Reports

MPS partners with YMCA to offer campus-based afterschool programming at each of its elementary school campuses during the school year. It provides YMCA with space rent-free. A review of each of the campus websites suggests that there is very little if any promotion that is done online to make parents seeking afterschool care for their children aware of this program and certainly no consistency between campuses. Sources are scarce but YMCA’s 2018 Impact Report stated that it had 18 sites throughout Spokane County that served more than 500 youth. MPS campuses represent less than half the number of facilities. Within MPS, YMCA’s Homework Club had 240 attendees with 60 regular students participating in 2016. It is not unreasonable to assume that the programs are, at times, at or near licensed capacity as shown in Table 15 below.

A review of licensed capacity at each campus indicates that on average, only 6% of kids are enrolled in on-campus afterschool care.

	Enrollment	Licensed Capacity	Percent Served
Brentwood Elementary	574	30	5%
Colbert Elementary	539	25	5%
Evergreen Elementary	610	30	5%
Farwell Elementary	606	40	7%
Meadow Ridge Elementary	591	45	8%
Midway Elementary	604	30	5%
Prairie View Elementary	661	40	6%
Shiloh Hills Elementary	555	35	6%
	4,740	275	6%

Table 19 MPS Licensed Afterschool Capacity

For non-YMCA members, there is a \$50 registration fee. There is financial support available for those students who qualify. Monthly fees are as follows. MPS participants receive discounts based on reduced school day schedules for the months of December (30 percent), April (25 percent) and June (50 percent).

	Regular	Y Member
5 Day Option	\$301	\$281
3 Day Option	\$183	\$168
Occasional	\$138	\$128
No School Days	\$42/Day	\$37/Day

Table 20 YMCA Fees

YMCA also offers summer day camps as well for kids in K through 8th grades at the following locations.

- Central Spokane YMCA
- North Spokane YMCA
- South Spokane YMCA
- Spokane Valley YMCA

Much as CFINW operates Camps Dart-Lo, YMCA also operates a camp approximately an hour northwest of Spokane called Camp Reed. It works in partnership with Spokane Public Schools, Mead, Central Valley, and Cheney Schools. In 2017, it had 1,884 participants.

CFINW has an inherent advantage in that it is much closer to MPS. When transportation is a significant barrier to participation, proximity is a tool that could be leveraged particularly if MPS campus space is limited or unavailable.

Market Analysis for Afterschool Fee-For-Service in Select Spokane Districts

Washington parents strongly support afterschool opportunities for their kids. 83 percent support public funding for afterschool, 69 percent say afterschool helps them keep their jobs, 54 percent say afterschool excites kids about learning, and 70 percent say afterschool reduces the likelihood that kids will engage in risky behavior. With parents’ support for afterschool programs strong, consider the landscape of such care.

Type of Afterschool Care in Washington

% of Kids in Afterschool Programs	17%
% of Kids Likely to Participate in Afterschool	31%
% of Kids in Self Care	20%
% of Kids in Care of Family/Other	32%

Table 16 America after 3PM, Afterschool Alliance

Again, the percentages above are statewide but useful for our purposes. Significantly more kids in Washington participate in afterschool programs than their peers in Idaho. There is a smaller gap to close percentage-wise but in the Spokane area, there are far more kids to attract to CFINW’s programs. Typically, demand is significantly greater for grades K through 5 than for middle school or high school. In considering the allocation of finite resources, CFINW greatest potential growth opportunity lies in K through 6th Grades.

Families who are not economically disadvantaged are considered more likely to embrace a fee-for-service model because they may have more disposable income. To consider what schools might present the best opportunity for a fee-for-service model, the percentage of kids who participate in free or reduced price lunch programs at each campus offers a good benchmark. Table 21 below ranks each school in both SPS and MPS accordingly.

Based on this metric alone, the schools that present the best opportunity for fee-for-service afterschool programs independently or as supplements to existing district programs and partnerships include Wilson, Hutton, Moran Prairie Woodridge, and Mullan Road Elementary Schools in SPS and all but Shiloh Hills in MPS. To underscore, there is competition at many of these campuses, one exception being Woodridge Elementary School according to data in Table 15.

Elementary Schools Ranked by % of Free & Reduced Price Meals

Spokane Public Schools

Wilson ES	16.4%	Balboa ES	39.9%	Adams ES	67.5%	Whitman ES	83.2%
Hutton ES	18.0%	Franklin ES	45.8%	Garfield ES	69.3%	Regal ES	84.1%
Moran Prairie ES	18.9%	Finch ES	51.3%	Madison ES	70.9%	Bemiss ES	86.5%
Spokane Montessori	24.7%	Lincoln Heights ES	54.7%	Cooper ES	73.9%	Logan ES	89.1%
Woodridge ES	27.6%	Roosevelt ES	59.0%	Willard ES	75.5%	Lidgerwood ES	89.4%
Mullan Road ES	28.1%	Browne ES	61.4%	Arlington ES	76.4%	Grant ES	100.0%
Jefferson ES	33.9%	Westview ES	65.1%	Audubon ES	80.6%	Holmes ES	100.0%
Hamblen ES	35.5%	Linwood ES	66.6%	Longfellow ES	81.0%	Stevens ES	100.0%
Indian Trail ES	37.5%	Ridgeview ES	66.7%	Sheridan ES	81.5%		

Mead Public Schools

Prairie View ES	9.5%	Colbert ES	28.8%
Midway ES	14.6%	Farwell ES	33.2%
Meadow Ridge ES	24.1%	Evergreen ES	38.7%
Brentwood ES	26.9%	Shiloh Hills ES	65.5%

Table 21 State of Washington OSPI 2017 Free and Reduced-Price Meals Eligibility Report

This is somewhat buoyed by the fact that while median incomes at all levels are slightly below national levels, so is the cost of living. SPS and MPS are both in areas that have greater potential to financially support additional afterschool programs than those in Kootenai County.

Conclusion

- SPS is supportive of adding community partners to provide services to its kids. There is a clear opportunity here to either supplement or provide afterschool services to at least some campuses.
- While MPS has unmet demand, because of its relationship with YMCA, it is unclear that supplemental on-campus programming is an option at this time. However, Camp Dart-Lo's proximity to MPS might present an opportunity to provide supplementary enrichment opportunities for MPS students.
- There are kids who are not being served in either SPS or MPS, though less so in the latter, either by their respective school districts or by other organizations in their communities. This suggests that there is a gap in service to be filled.
- There is no indication that any of the high quality programming offered by Camp Fire, particularly as it pertains to environmental and fire-wise education, is widely available. Such programming is supported by OSPI's *Environmental Education Report: Empirical Evidence, Exemplary Models, and Recommendations on the Impact of Environmental Education on K-12 Students*. This represents a significant opportunity for CFINW.
- Given CFINW's declining revenue, which may be momentary, an extension of service should be done cautiously in those areas that demonstrate the potential for a higher level of financial support or in partnership where financial risk is nominal.
- Demographics support at least some expansion of a fee-for-service afterschool program though it should be very targeted to particular campuses such as Woodridge Elementary School or others whose families appear to have greater financial capacity.
- While it is beyond the scope of this report to explore staff licensing requirements and how they apply to either districts or service providers, there appears to be an opportunity to help SPS overcome its staffing challenge of having enough qualified site directors to utilize available, licensed capacity to serve more kids.
- Neither district does a good job of promoting the availability of afterschool programming online at the district or particularly at the campus level where parents are most likely to engage. In SPS, at best, it lacks consistency. In MPS, it is all but absent. In order to succeed, and particularly for any partnership with CFINW to succeed, promotion of afterschool programs and content must be highly visible and consistent for busy parents to easily find and connect.
- Camp Dart-Lo is readily accessible particularly for SPS schools in northern suburbs of Spokane as well as MPS campuses.

- Seek out other organizations who might be able to utilize Camp Dart-Lo during non-peak seasons can provide a source of revenue without the burden of retaining significant staff.
- Partnership opportunities might exist to expand exposure for CFINW while offering richer experiences for kids. Some prospective entities might include the following.
 - Gonzaga University Center for Community Action & Service Learning
 - Spokane Parks & Recreation Department
 - Spokane Urban Forestry Department
 - Community Canopy
 - The Lands Council
 - Spokane County Conservation District
 - Spokane Parks Foundation
 - WSU Extension - Spokane County Forestry & Natural Resources
 - Leadership Spokane Youth and Adult programs

Next Steps:

1. Engage with targeted districts to determine their willingness to engage CFINW to provide afterschool programming.
2. Establish baseline resources needed to expand services.
3. Develop a business plan to support the afterschool program using SMART goals.
 - a. Specific – target a specific area for improvement.
 - b. Measurable – quantify or at least suggest an indicator of progress.
 - c. Assignable – specify who will do it.
 - d. Realistic – state what results can realistically be achieved, given available resources.
 - e. Time-related – specify when the result(s) can be achieved.
4. Establish a program budget and build an appropriate revenue model to ensure at least a breakeven result for fee-for-service offerings.