

# JData Revealed

JEWISH EDUCATION DATA WHEN YOU WANT IT

## Note from the Director

In this issue of *JData Revealed* we present findings from the Summer 2013 annual camp census. Eight headlines summarize key trends in enrollment, staffing, and budgets. In addition to overall growth in the Jewish overnight camp world, you will see a "Tale of Two Camps"—a recognition that while many camps are growing, some are not.

The census is based on the 150 overnight camps that come under the ***Foundation for Jewish Camp (FJC)*** umbrella. These camps have all met a set of ***criteria for inclusion***. Included among these camps are all of those associated with JData's other camp partners: ***JCamp180***, ***URJ Camps***, ***National Ramah Commission***, and ***JCC Association***. Our partners' shared use of the database not only creates an efficiency for the camps but has led to a common conversation across the field concerning metrics and data usage.



This year, in response to frequent questions, JData added a section on top management salaries at camp. To date, 93 camps have provided this information. Our ***report on camp director compensation*** is now available on the JData website.

March 23-25 is the fifth biennial ***FJC Leaders Assembly***, a time and place for camp leaders and stakeholders to learn, share, and network. Nicole Samuel, JData Manager responsible for camp, will be there and happy to speak with you about this year's data and beyond. All of us at JData wish FJC an inspiring and productive gathering.

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## Headlines from the World of Jewish Overnight Camp

### ***Enrollment in Jewish overnight camps continues to grow at a steady annual pace.***

Summer 2013 continued the growth of previous years with a 2.6% increase in the number of campers at the 150 nonprofit Jewish overnight camps in JData. These camps served over 70,000 campers this past summer.

Some of this growth comes from recently opened camps and other camps newly welcomed to FJC (Camp Cabri, Camp Kaylie, Gan Israel Toronto, Moshava Malibu, Yachad Camp Programs, and Yesh Shabbat). And some of the growth comes from increased capacity and enrollment within individual camps. Together these camps added over 1,400 new beds to the field's total capacity.

Behind these numbers, however, is a "Tale of Two Camps" — those that are gaining and those that are losing campers. Between 2012 and 2013:

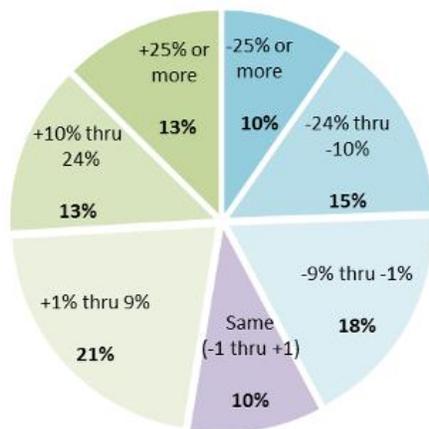
- 47% of camps experienced higher enrollments;
- 47% experienced lower enrollments;
- 6% remained about the same.

Overall numbers increased largely because more camps saw extraordinary growth than saw great decline (9% versus 2% of camps).

The more years of data, the more accurate the picture of trends. Many of the camps have enrollment data covering a three year period (2011-2013). (See Figure 1.) This broader lens shows an average change in enrollment of +3%. As compared with the two-year picture, it also shows:

- the same percentage of camps with growing enrollment (47%), but more camps with stable enrollment (10%) and fewer in decline (43%).
- noticeably larger percentages at the extremes, with 13% of the camps experiencing extraordinary increases and 10% having great declines.

FIGURE 1: PERCENTAGE CHANGE IN ENROLLMENT (2011-2013)



n=138 camps

Change in enrollment over the three year period differs by region: On average camps in the Midwest saw 1% growth in enrollment; those in the Northeast and West saw 2% growth; and those in the South had an average 4% increase in camper enrollment.

The three-year picture also shows the effect of camp size on growth. The smallest camps (those with fewer than 100 campers) were more likely to decline in enrollment than the larger camps. On average, they declined by 4% while the larger camps grew by 3%.

### ***Capacity utilization is a "Tale of Two Camps".***

Capacity utilization is a key metric for Jewish overnight camps. It indicates how many of the camp's beds are used during the summer. Given that enrollments differ week by week and session by session, it is calculated as the average of a camp's weekly utilization.

In Summer 2013, average capacity utilization was 76% (up from 74% the previous summer). This means that, on average, one-fourth of a camp's capacity was unused. If all these camps operated at full capacity, they could engage close to 17,000 more campers.

The average belies the "Tale of Two Camps". Just over half the camps are at least 80% full; the rest fall below that threshold.

- 27% of camps are between 90% and 100% full.
- 25% of camps are between 80% and 89% full.
- 33% of camps are between 50% and 79% full.
- 15% are less than half full.

Moreover, about half saw improvement in their capacity utilization in 2013 and half did not.

***The gender gap at Jewish overnight camps closed, but only slightly.***

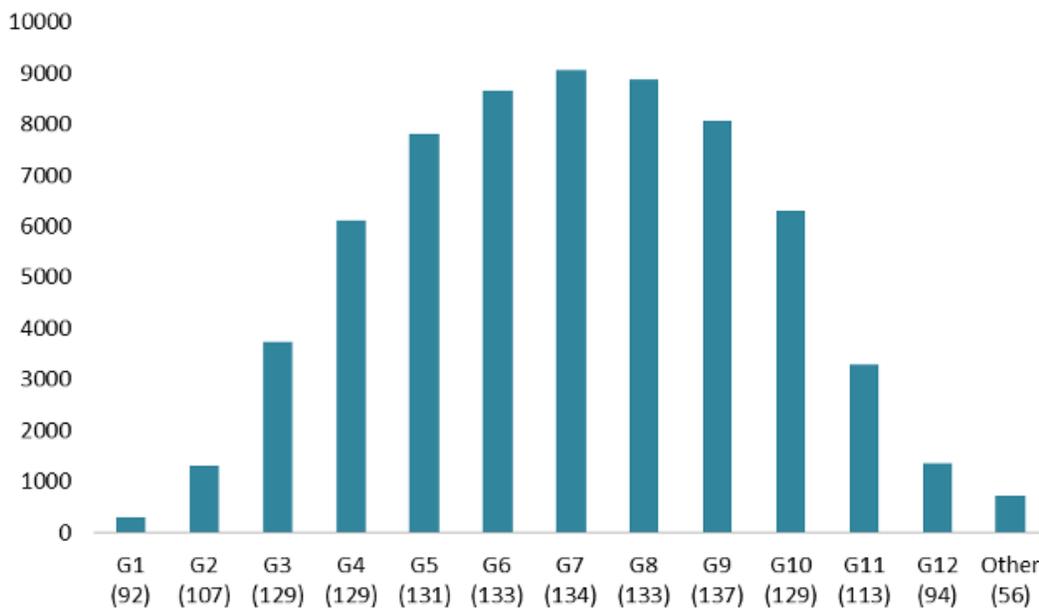
In Summer 2013, 52% of campers were girls; 48% were boys. This represents a closing of the gender gap, which in 2012 stood at 54% girls and 46% boys. It appears that the shift, small as it may be, was helped by boys-only camps.

TABLE 1: CAMP PROGRAM	Number of camps	Percent of total campers served
<b>Co-educational camps</b>		
Boys and girls together (integrated programming)	102	74%
Boys and girls separate (separate programming)	15	12%
Boys and girls separate or together depending on age	9	7%
<b>Single sex camps</b>		
Girls only	9	3%
Boys only	11	4%
Total	146	100%

***The teen challenge remains.***

As seen in Figure 2, overnight camp continues to be a middle-grade phenomenon, with a noticeable drop off in the high school years. Those entering grades 10 to 12 are 17% of the camper population. Note that many camps do not offer high school age programs, a fact which may be a cause and/or an effect of the relatively small number of participants in this age group.

FIGURE 2: GRADE BY GRADE ENROLLMENT (2013)

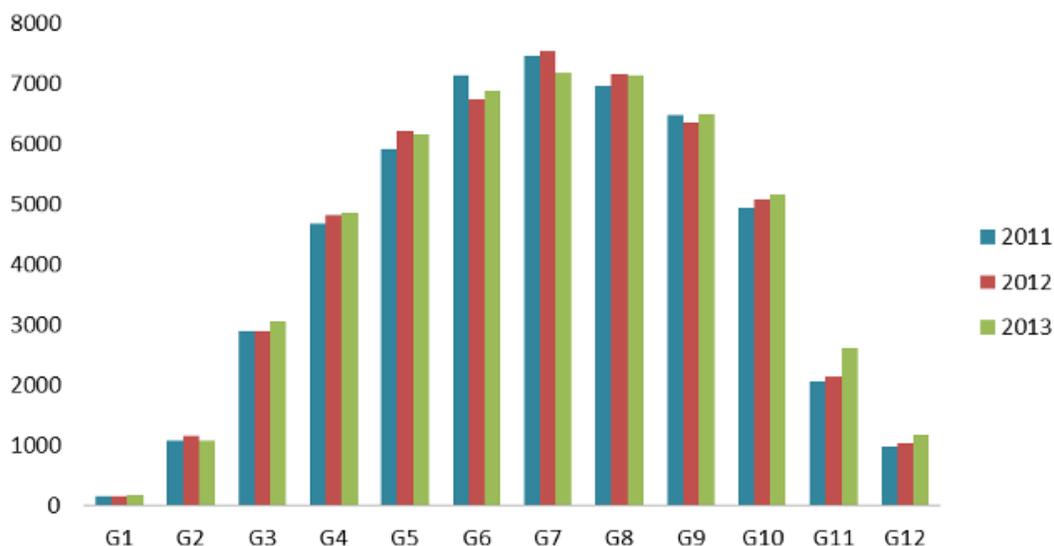


n=144 camps

Note: Number in parentheses is the number of camps serving campers in the particular grade cohort.

Figure 3 shows the remarkable stability of the grade pattern at camp from 2011 through 2013. It also shows an increase in 11th graders in 2013, a bright spot in the data. Camps providing these data had almost 600 more campers in this age group as compared with the prior year.

FIGURE 3: GRADE BY GRADE ENROLLMENT (2011 TO 2013)



n=113 camps

One way that teens are engaged in Jewish overnight camp is through counselor-in-training (CIT) programs. About three-fourths of the camps have a CIT program. These programs brought in close to 3,000 teens in Summer 2013.

**2013 camper retention and recruitment rates continue past trends.**

Healthy enrollment depends on success in retaining current campers and recruiting new campers.

Retention rate is based on the number of campers from the previous summer who were eligible to return to camp in the current year and, in fact, did so.

- Overall, camps had a 79% return rate in Summer 2013.
- In our "Tale of Two Camps", half of the camps were below this number (and went as low as 10% return rate) and half were above this number (and achieved as high as 100% return rate).
- First-time campers are less likely to return than campers with previous experience at the camp. Average first-time camper return rate in Summer 2013 was 50%.
- Overall retention rates are similar to those reported in Summer 2012. First-time camper return rates are slightly lower than the previous summer.

Of particular interest from a field-wide perspective is the number of campers who are new to Jewish overnight camp. Summer 2013 saw the following:

- 115 camps introduced over 11,000 campers to Jewish overnight camp for the first time.
- 81 camps offered introductory programs that reached over 3,500 children.

These achievements continue the rate of growth reported in Summer 2012.

### ***Camp is really about the counselors.***

With all of the focus on campers, we should never lose sight of the role that a Jewish overnight camp plays in the lives of the young adults who work at camp during the summer.

All totaled, close to 20,000 people worked at FJC affiliated overnight camps in 2013. Of these, 5% are fulltime year-round staff; 2% are part-time year-round staff; and 93% are summer only.

Although percentages of year-round staff are relatively small they represent an extraordinary change in the camp world since 2000. At that time, many camps had no dedicated year-round staff. Today every camp has year-round staff; and for virtually all of them, that includes fulltime personnel.

In season, the reporting camps engaged over 7,600 bunk counselors and assistant counselors along with some 3,300 activity specialists, over 1,500 program supervisors, and close to 620 Judaic specialists. Most of these are Jewish young adults. Estimates are that 96% of bunk counselors and 80% of activity specialists are Jewish. Only three camps have a majority of non-Jewish bunk counselors.

Camps continue to bring new people into counselor positions. On average, 44% of bunk counselors were new hires in Summer 2013. Some were campers and/or CITs at the camp and some came from outside the camp. Nonetheless, new hires represent the expansion of the counselor experience to significantly greater numbers of Jewish young adults.

### ***The FJC overnight camp world is estimated to be a \$250M enterprise and growing.***

The increase in total operating expenses between 2012 and 2013 was 3% on average, similar to the percentage increase in enrollment.

- Between 2012 and 2013, 47% of camps saw an increase in their operating expenses, 11% held their costs stable, and 35% lowered costs.
- Total capital expenditures in 2013 were about \$30M (91 camps reporting).
- On average about 90% of total operating expenses are covered by tuition and fees (88 camps reporting).

### ***Jewish overnight camps are becoming fundraising organizations.***

Of the reporting camps:

- 83% now have a development committee of the board.
- 30% have an endowment; 30% have a capital campaign; 47% have an annual campaign; and 55% have a scholarship campaign. Several of these funds and campaigns began in 2013.
- 47 camps raised over \$4M for scholarship in the past year.
- 109 camps gave close to \$23M in financial aid in Summer 2013.