

Detailed Findings

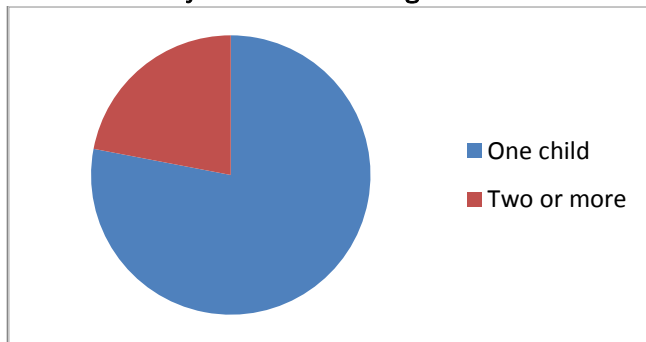
I. RECIPIENT PROFILE – Family and Camper

About the Family and Parents of OHC Campers

- Most families were applying for the OHC for one child.
- 18% (or over 1,310) of OHC families (projected to the total OHC recipient group) have no affiliation with a synagogue.
- 37% (or over 2,700) of OHC campers (projected to the total OHC recipient group) did not have a parent who attended Jewish overnight camp.
- Relative to national profiles, OHC parents are relatively upscale and highly-educated, similar to what we’ve seen for camp families in general and 73% were *both* born in the U.S.
- More than three-fourths are families where both parents identify as being Jewish

Family history with One Happy Camper

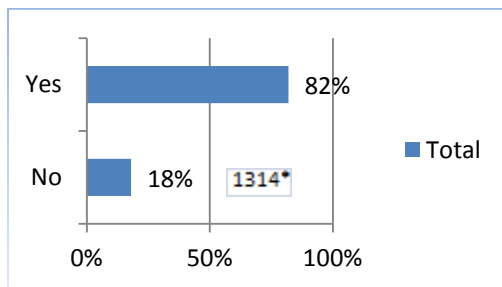
Number of family members receiving incentive



Similar results in 2013

Synagogue and Affiliation

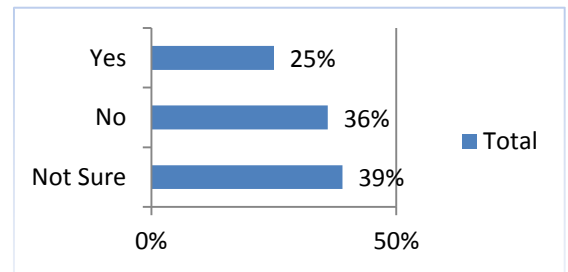
Affiliated with a synagogue or temple?



Similar results in 2013

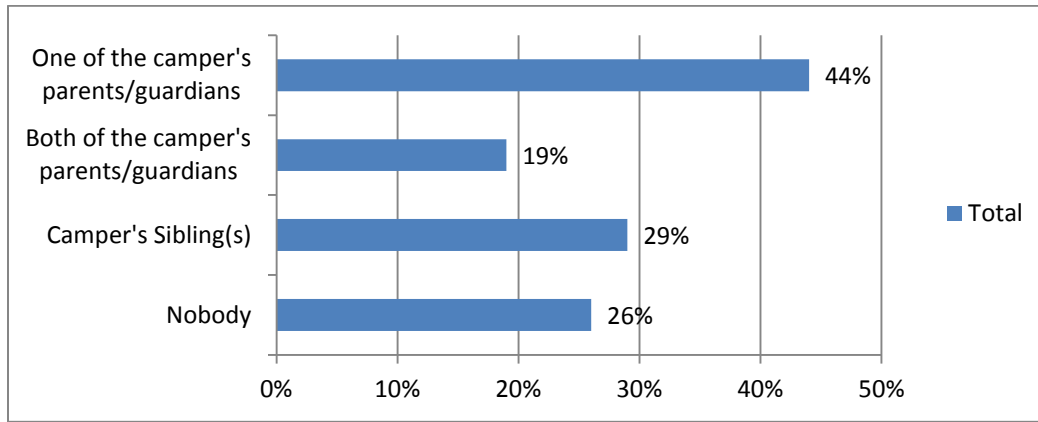
*Projected total based on research percentage applied to total North American OHC recipient number

Does your temple/synagogue offer their own financial incentives/scholarships?



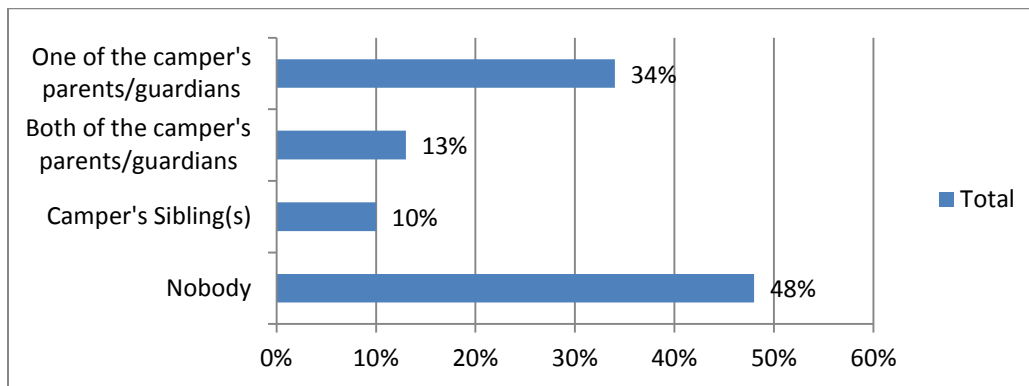
Previous family experience at overnight camp

Jewish overnight camp



Similar results in 2013

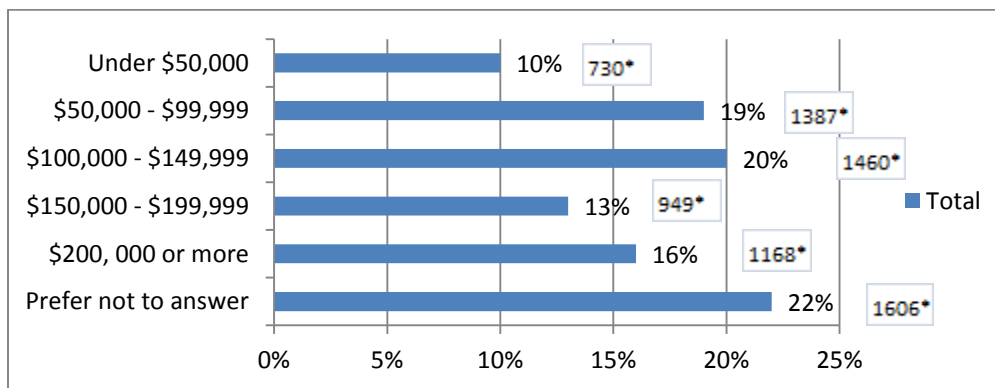
Non-Jewish overnight camp



Similar results in 2013

OHC Family Profile

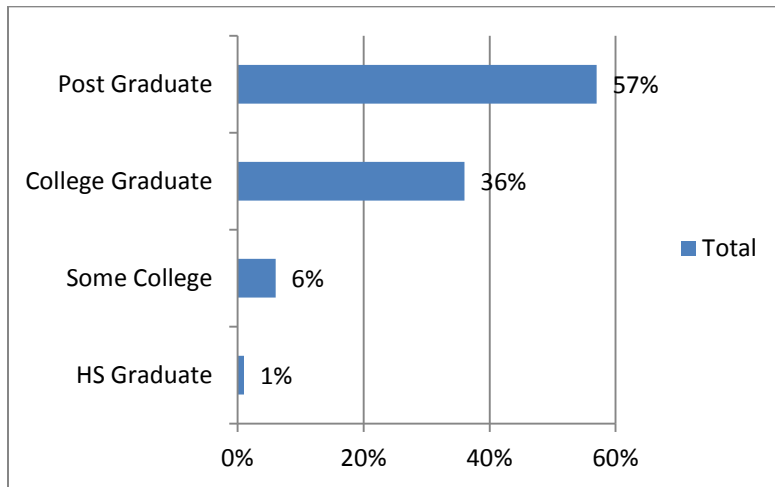
Total HH Income:



Similar results in 2013

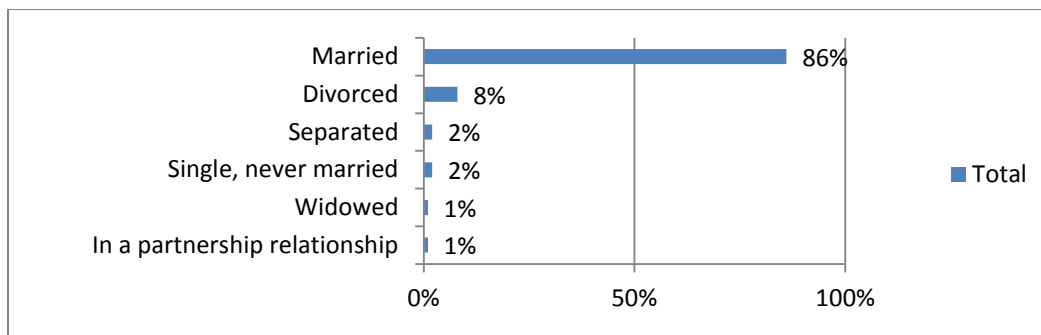
*Projected total based on research percentage applied to total North American OHC recipient number

Parent Education Level:

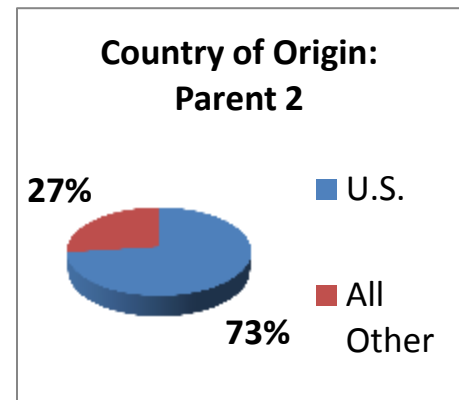
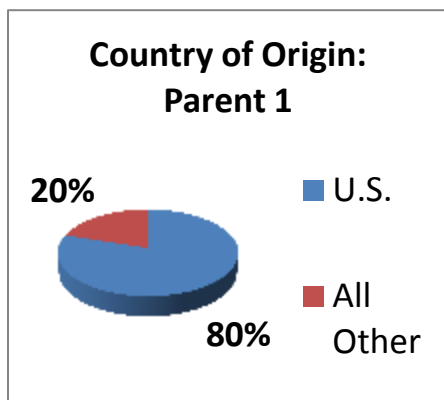


Results above for Parent completing survey; results for second parent generates similar results

Marital Status:



Both Parents American Born:



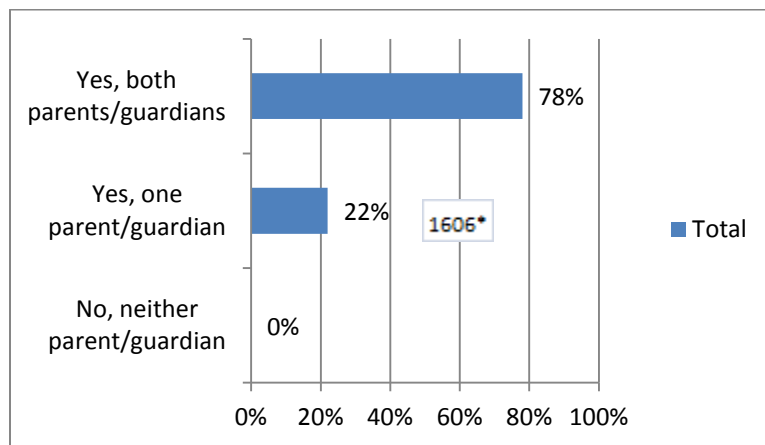
Similar results in 2013

If not, where:

Country of Origin:	Parent 1	Parent 2
United States	(5,840*) 80%	(5,329*) 73%
Canada	(438*) 6	(438*) 6
Israel	(292*) 4	(365*) 5
Ukraine	(146*)2	(146*) 2
Russia	(146*)2	(146*) 2
S. Africa	(73*) 1	(146*) 2
United Kingdom	0	(73*) 1
Other	(292*)4	(730*) 10

*Projected total based on research percentage applied to total North American OHC recipient #

Do either one or both of the camper's parents/guardians identify as being Jewish?



Similar results in 2013

*Projected total based on research percentage applied to total North American OHC recipient number

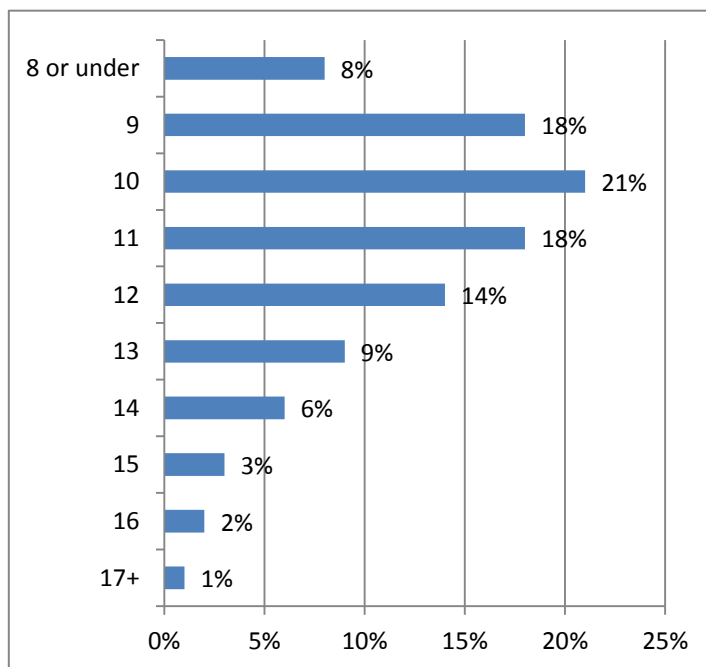
About the Camper

- Most OHC recipients are first-time campers. 43% of first-time campers do not participate in Jewish youth groups or youth activities, making camp their primary immersive experience with Jewish peers.

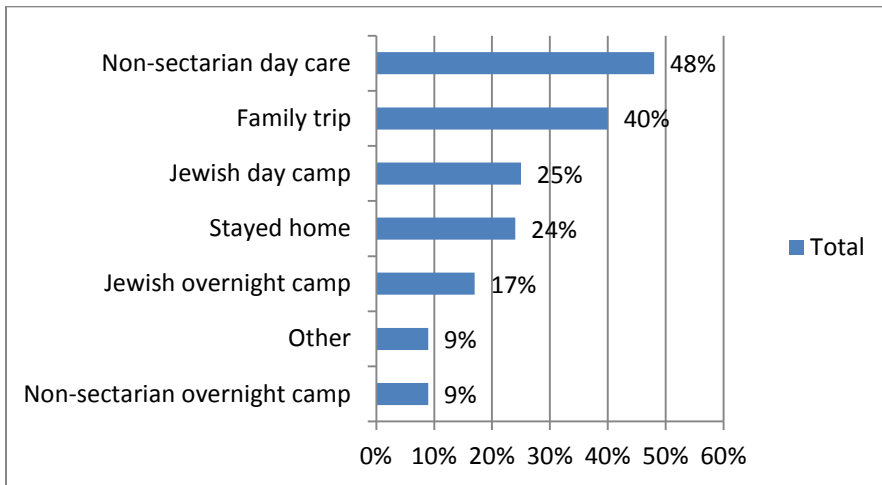
Throughout the year, how often, if ever, does your child participate in any of these other organized Jewish activities?

	Daily/ Weekly	A Few Times/Month	Every Few Months	Never
Synagogue/Temple services	17%	26%	47%	10%
Hebrew/religious school	72%	7%	3%	18%
Jewish youth group/activities	7%	13%	37%	43%
Programs at Jewish Community Center	3%	4%	24%	69%
Community service: service-learning or youth philanthropy project organized by a Jewish organization	1%	4%	39%	56%
Celebration of Jewish holidays	28%	24%	47%	1%
Participation in Jewish and/or Israel cultural events	9%	13%	55%	23%
Other	13%	3%	6%	78%

Age of child (youngest camper):



How did they (the 2014 OHC recipient) spend last summer (2013)?

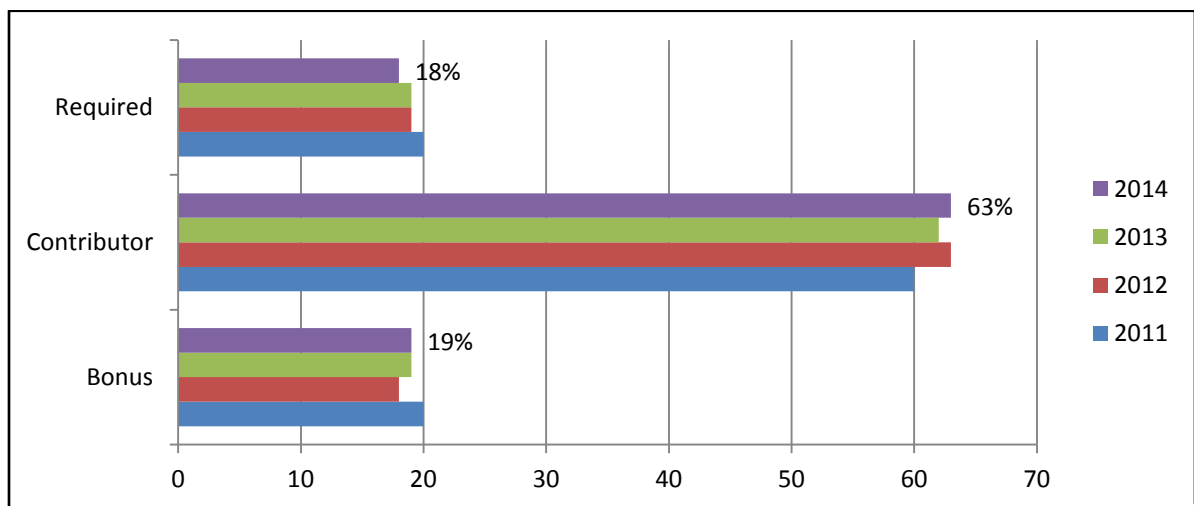


II. THE ROLE OF THE INCENTIVE AS STIMULUS FOR ATTENDING JEWISH CAMP

Role of incentive in summer plans

- In 2014, 18% of OHC recipients comprised the Required group (e.g., “*not at all*” likely to have attended camp without the incentive). Predictably, this group had a higher incidence of lower-income households.
- Without the incentive, the majority of campers would have gone to a non-sectarian day camp (45%) or stayed home (30%).
- Even more compelling is the fact that for many, OHC incentives helped influence their decision to provide their child with a *Jewish* summer experience. The research showed that from an array of summertime alternatives, *over half* (60%) of all OHC recipients were considering only non-Jewish activities or programs.
- Another striking finding– when the *Bonus* segment (the 19% of generally higher-income parents who were “extremely likely” to send their child to camp, regardless of the incentive) told us about *their* alternatives to Jewish overnight camp, close to half (42%) identified *only* secular options. In other words, even when money was less of an issue, the OHC incentive helped steer them towards making a *Jewish* choice. Among *Required* families, over three-quarters (77%) identified only secular options.

Likelihood that child would have gone to Jewish overnight camp without incentive:

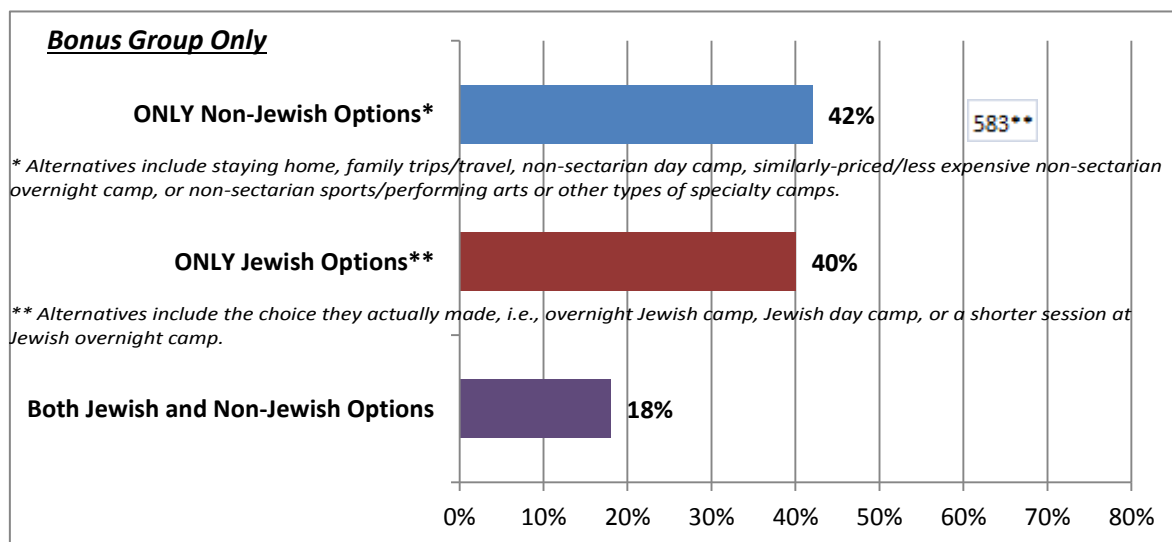
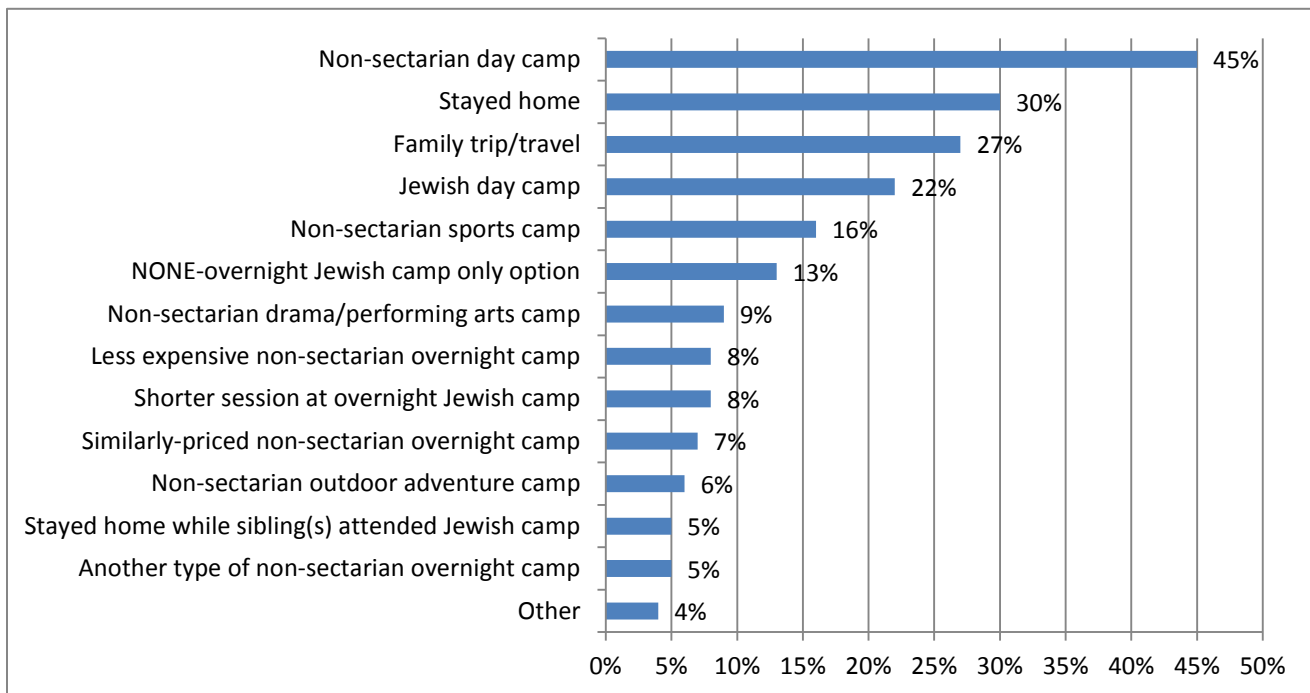


Likelihood that child would not have gone to Jewish overnight camp without incentive (segmented by family income):

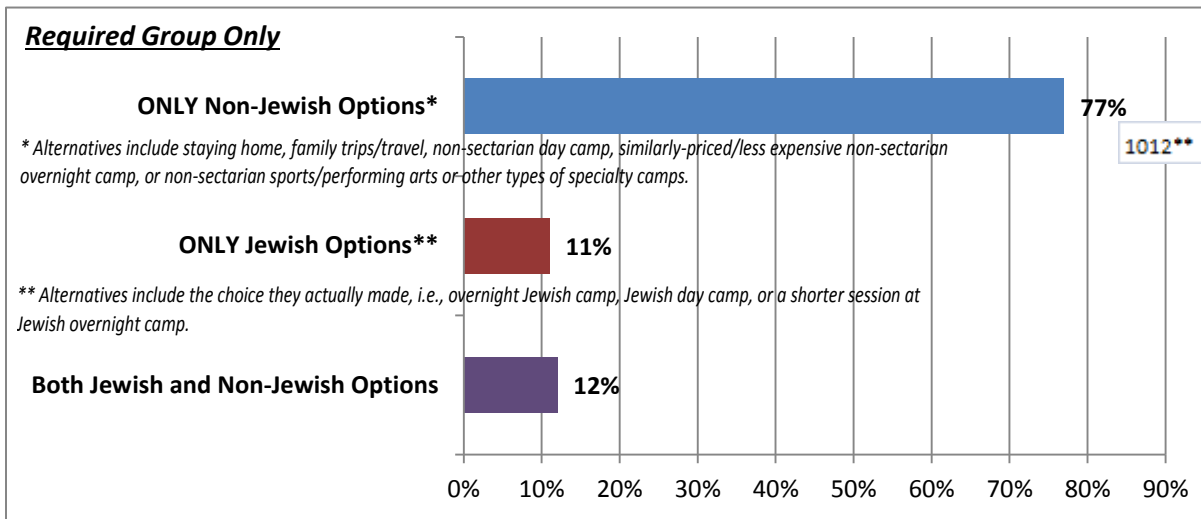
Total U.S.	Required n=573	Contributor n=2,007	Bonus n=609
Under \$100K	58%	24%	10%
\$100-\$150K	21	22	14
Over \$150K	9	31	51
Didn't Provide Income	12	23	24

*Projected total based on research percentage applied to total North American OHC recipient number

What would the camper have done this summer if they had not gone to Jewish overnight camp (Total OHC):



**Projected total based on research percentage applied to North American Bonus OHC recipient number

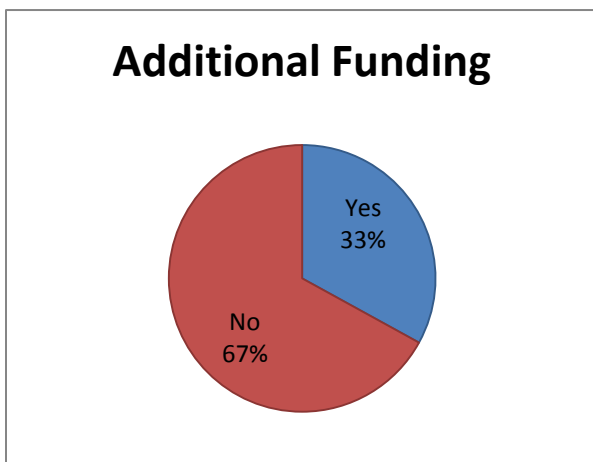


***Projected total based on research percentage applied to North American Required OHC recipient number

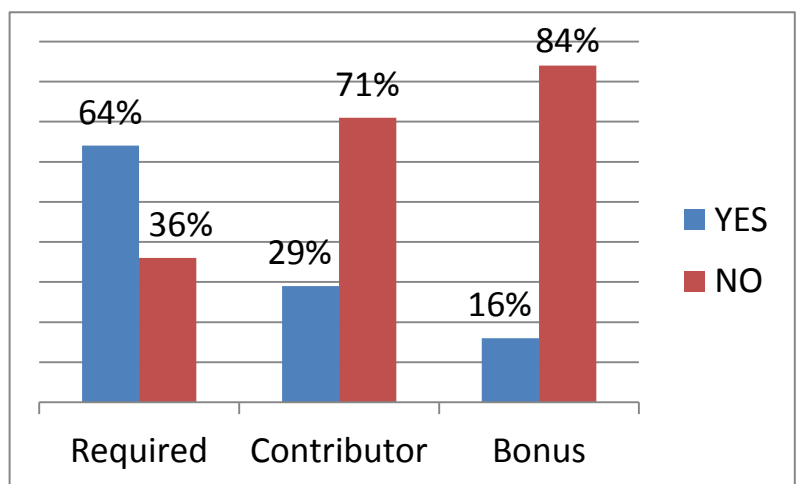
OHC grant as financial assistance:

- Among all parents who said they were less likely to have sent their kids to camp, nearly 85% cited cost and affordability as the barrier that OHC helped them to overcome.
- 33% of families indicated that they were receiving (or hoped to be receiving) additional outside funding, which is consistent with the findings from the OHC Retention Study. This climbed to 64% among the Required group. This scholarship funding (not OHC incentive funding) was coming primarily from the camps (58%) or from their temple/synagogue (47%).

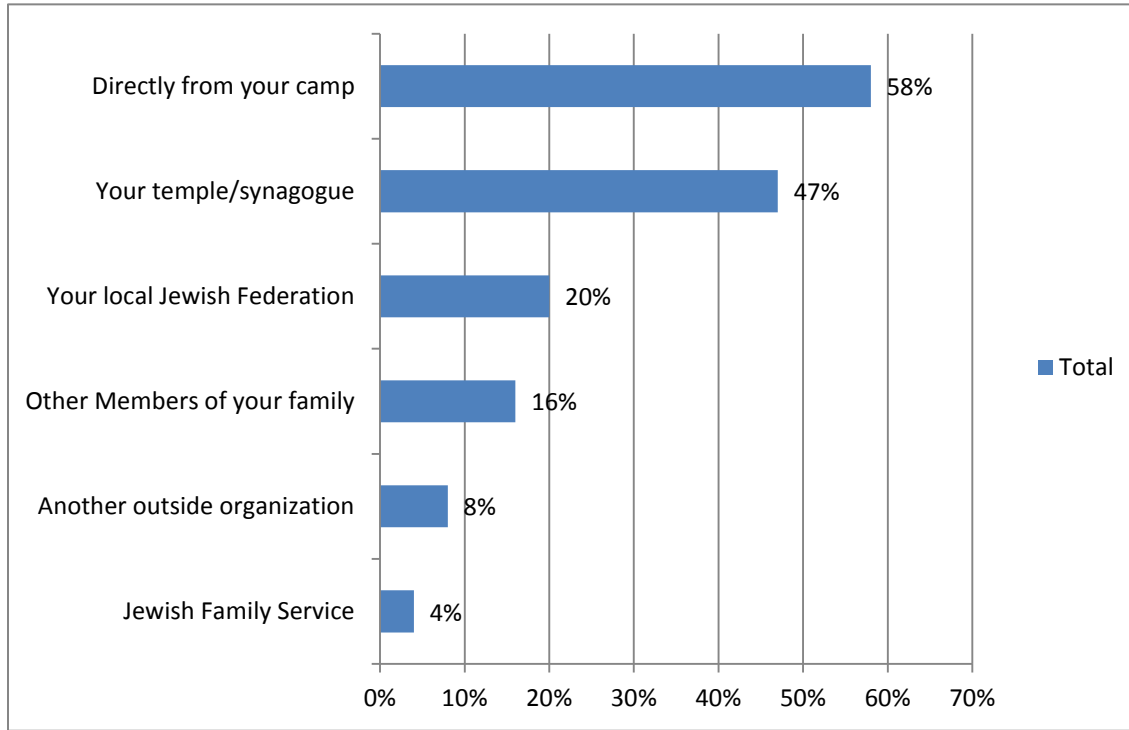
Received (or hoped to receive) additional outside funding:



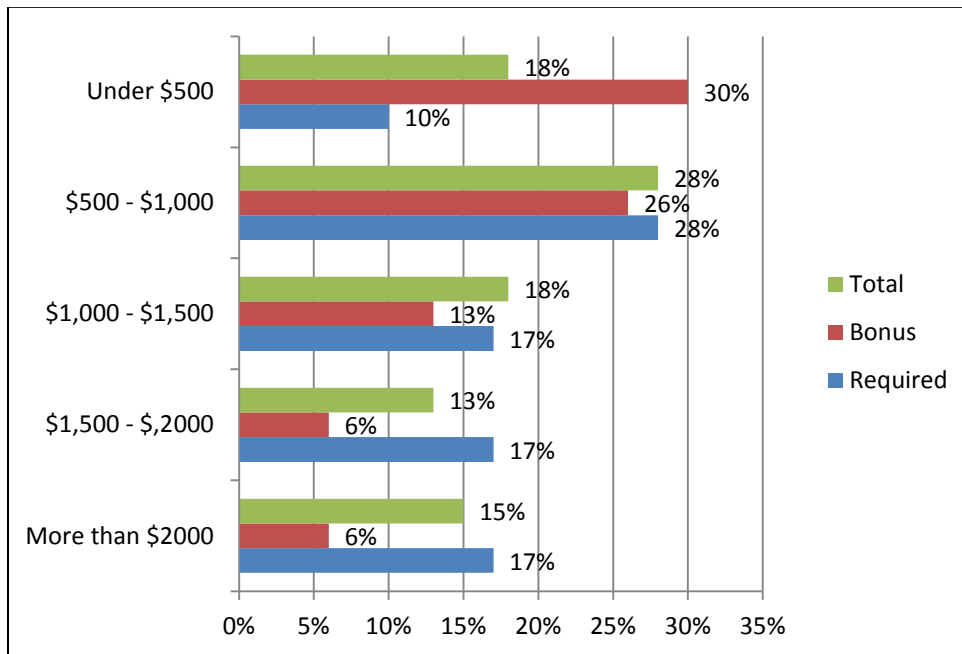
Results similar to 2013



Where does that funding come from:



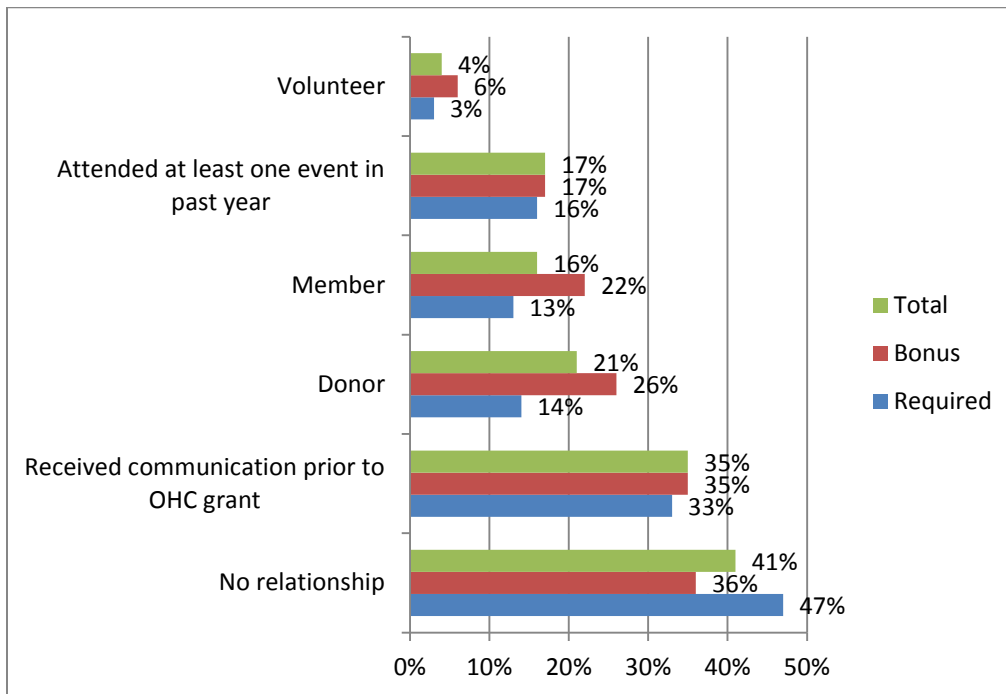
How much additional funding are recipients expecting to receive:



III. JEWISH ENGAGEMENT

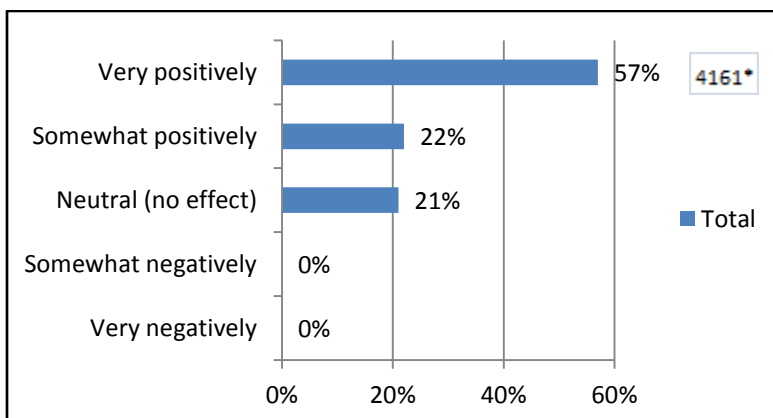
- For the majority of families, OHC had the additional perceived benefit of creating closer ties to their Jewish community and/or their Federation.
 - Over 60% (or nearly 4,600 OHC families projected to the total OHC recipient group) are not currently members and/or donors of their sponsoring organizations, many with giving potential.
 - 57% (or over 4,150 OHC families projected to the total recipient group) believed the incentive "very positively" affected their family's connection to the overall Jewish community or local Federation.
 - 73% (or over 5,300 OHC families projected to the total OHC recipient group) were more likely to support the sponsoring organization.

Are you a member, a donor, or do you support, in some manner, this organization?



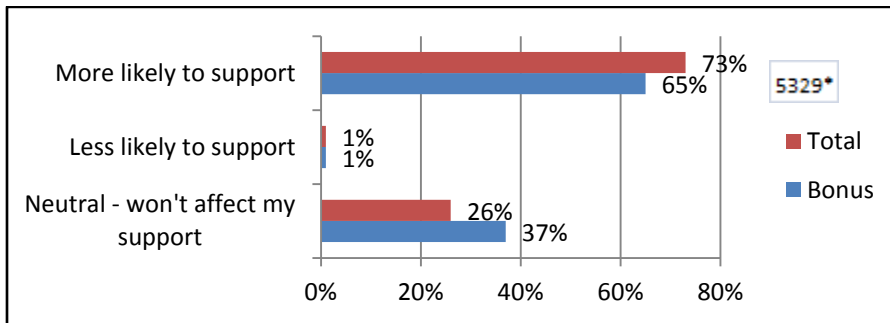
*Projected total based on research percentage applied to total North American OHC recipient number

Did the OHC grant affect the family's connection to the overall Jewish community and/or local Jewish Federation:



*Projected total based on research percentage applied to total North American OHC recipient number

How might your One Happy Camper experience affect your support for the sponsoring organization?

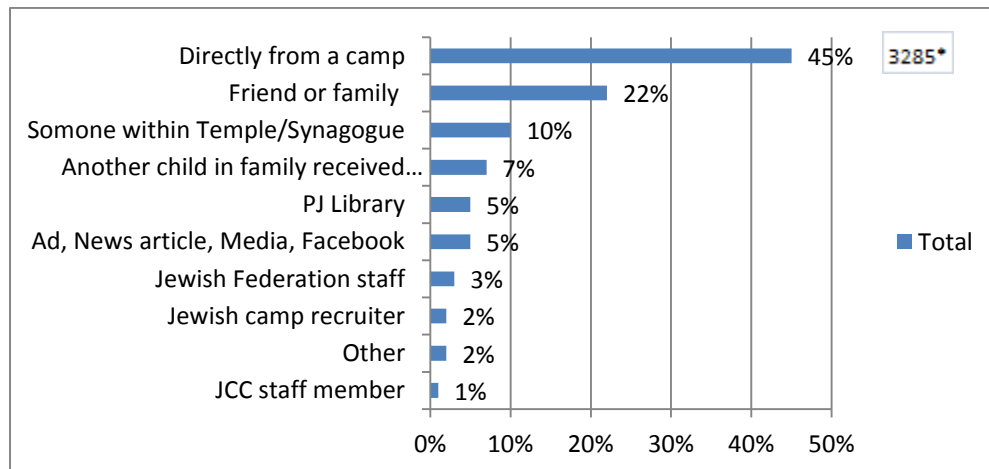


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IV. INCENTIVE AWARENESS AND THE APPLICATION PROCESS

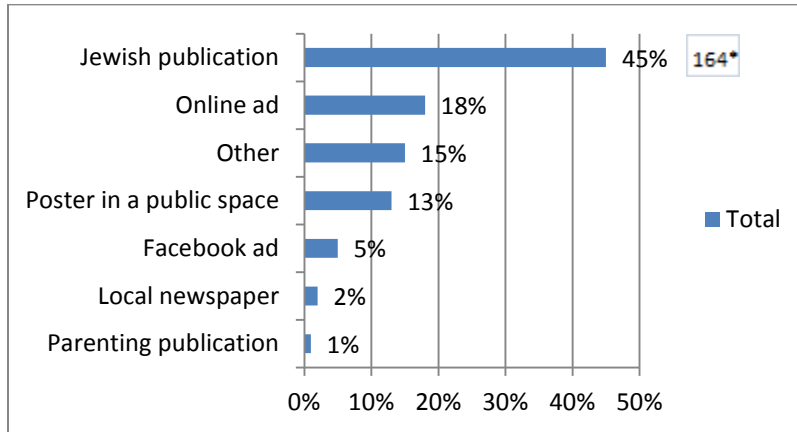
- Hearing about OHC came primarily from the camp and the “buzz” from friends and family.
- Most recipients began their search for camp by talking to family/friends (60%), but nearly a quarter (or nearly 1,680 OHC families projected to the total OHC recipient group) began by talking directly to the camp or going to their website.
- More than 55% of recipients started their camp search/summer planning at least 9 months in advance.
- The application process was favorably received, with most offering no suggestions for improvement; however, the majority of respondents were still not aware that the FJC was a co-sponsor of this program

How did you hear about the OHC Program?



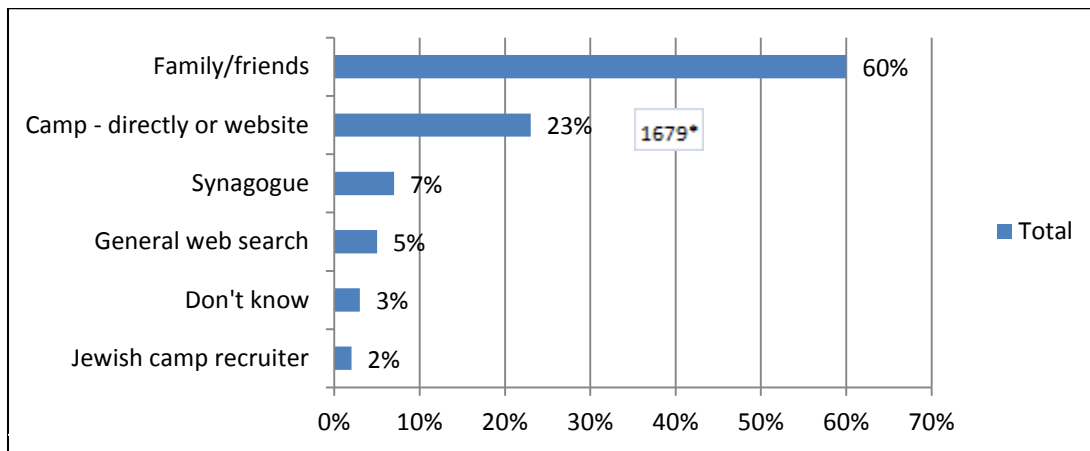
* Projected total based on research percentage applied to total North American OHC recipient number

Did you hear about OHC Program through an ad or news article, and where?



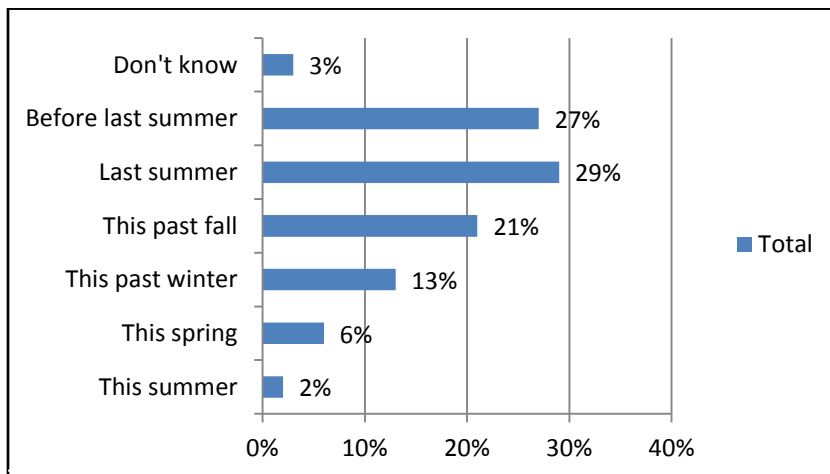
* Projected total based on research percentage applied to total North American OHC recipient number (51% of the 5% who indicated they heard about the OHC program through an ad or news article)

Where did you start your search for information regarding Jewish overnight camp?

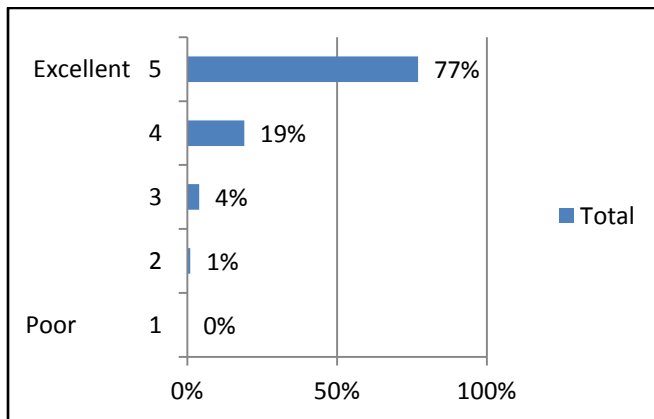


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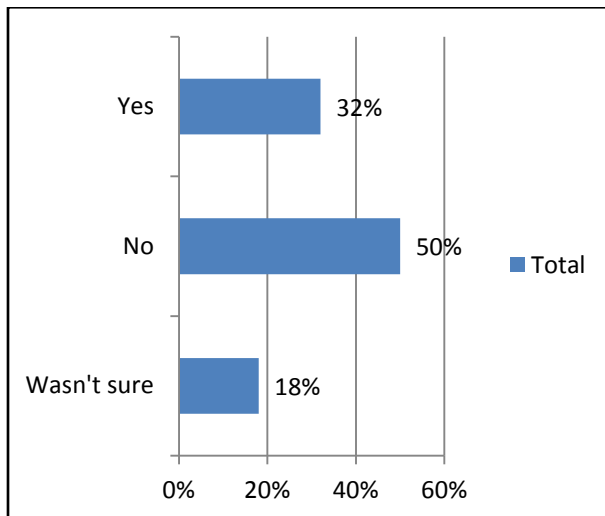
And at what point in the year did you begin specifically considering Jewish overnight camp for this summer of 2014?



Overall-rating of the application process:



Were you aware that the Foundation for Jewish Camp is also a co-sponsor of this program:



Appendix I - Scope of OHC Program since 2006

Summer	# of Partners	# Incentive Campers
2014	68	7,300
2013	65	7,300
2012	69	8,400
2011	67	8,600
2010	55	8,500
2009	37	6,200
2008	21	3,400
2007	7	1,800
2006	1	725

Communities participating in the 2014 OHC program:

- Atlanta
- Atlantic Jewish Council (Halifax)
- Boston
- Calgary
- Chicago
- Cleveland
- Colorado
- Columbus
- Delaware
- El Paso
- Greensboro
- Hartford
- Indianapolis
- Los Angeles
- Louisville
- MetroWest NJ
- Milwaukee
- Montreal
- Nashville
- New Hampshire
- Northern NJ
- Omaha
- Palm Springs
- Philadelphia
- Pittsburgh
- Portland
- Rhode Island
- San Diego
- San Francisco
- Seattle
- St. Louis
- Toronto
- Washington DC.

In addition, PJ Library and more than 30 camps and camp movements participated in the 2014 OHC program

Appendix II - Response Rates by Participating Partners

	# Campers invited	# of survey responses	Response Rate
Jewish Federation of Greater Atlanta	200	115	58%
Jewish Federation of Greater Hartford	33	18	55%
Jewish Community Foundation of Colorado	114	75	66%
Jewish Federation of Northern New Jersey	88	53	60%
Combined Jewish Philanthropies of Greater Boston	316	181	57%
Bnai B'rith Mens Camp Association	20	16	80%
Union for Reform Judaism	692	445	64%
Jewish Federation of San Diego County	139	82	59%
JUF Chicago	418	228	55%
Milwaukee Jewish Federation	18	13	72%
Greensboro Jewish Federation	11	6	55%
Jewish Federation of Greater Indianapolis	20	13	65%
Jewish Community of Louisville	11	7	64%
Jewish Federation of Greater Los Angeles	480	291	61%
Jewish Federation of Columbus	35	21	60%
Jewish Community Federation of San Francisco	142	102	72%
Young Judaea	161	79	49%
Jewish Federation of El Paso	1	1	100%
Havurah at Camp Tel Yehudah	20	9	45%
JCC Maccabi Sports Camp	30	21	70%
Gen J/Federation CJA of Montreal	82	52	63%
Jewish Federation of New Hampshire	7	4	57%
Camp JCA Shalom	45	16	36%
Jewish Federation of Greater Philadelphia	236	141	60%
Jewish Federation of Greater Pittsburgh	73	45	62%
National Ramah Commission	216	130	60%
Jewish Federation of Greater Portland	61	39	64%

	# Campers invited	# of survey responses	Response Rate
Jewish Federation of Delaware	6	5	83%
Camps Airy and Louise	175	102	58%
JCC Ranch Camp	34	20	59%
Camp Sabra	23	9	39%
JCC Camp Chi	11	4	36%
Capital Camps	53	23	43%
Jewish Federation of St. Louis	54	30	56%
Adamah Adventures	2	1	50%
Moshava Malibu	48	28	58%
Jewish Federation of Greater Washington	55	38	69%
Camp JRF	19	14	74%
B'nai B'rith Perlman Camp	8	7	88%
Camp INC	23	14	61%
Jewish Federation & Jewish Education Center of Cleveland	108	55	51%
Camp Louemma	27	13	48%
Partnership for Jewish Learning and Life (MetroWest)	190	106	56%
Camp L'man Achai	13	6	46%
Camp Barney Medintz	16	10	63%
Calgary Jewish Federation	7	3	43%
Habonim Dror Camp Association	32	25	78%
Jewish Federation of Greater Seattle	73	40	55%
Eden Village Camp	9	7	78%
PJ Goes to Camp	405	281	69%
Berkshire Hills Emanuel Camps	26	10	39%
Jewish Alliance of Greater Rhode Island	30	18	60%
Atlantic Jewish Council	23	15	65%
Camp Livingston	5	1	20%

	# Campers invited	# of survey responses	Response Rate
Jewish Federation of Omaha	5	2	40%
Jewish Federation of Nashville	18	12	67%
UJA Federation of Greater Toronto	333	186	56%
Surprise Lake Camp	91	48	53%
Jewish Federation of Palm Springs	7	5	71%
Camp Zeke	37	18	49%
BIMA/Genesis at Brandeis University	8	6	75%
Camp Poyntelle	7	5	71%
Passport NYC	40	22	55%
Camp Nageela	40	12	30%
Camp Nageela Midwest	14	3	21%
Camp Mountain Chai	20	16	80%
Camp Hatikvah	4	4	100%
Camp Avoda	3	2	67%