



Jewish Summers. Jewish Future.



SNAPSHOT OF JEWISH DAY CAMPS IN NORTH AMERICA 2016

HIGHLIGHTS FROM
FOUNDATION FOR JEWISH CAMP
2016 CAMP CENSUS

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ABOUT THE 2016 CAMP CENSUS

The Foundation for Jewish Camp Day Camp Census 2016 portrays selected characteristics of nonprofit Jewish day camps across North America. The third annual Day Camp Census was conducted by the Foundation for Jewish Camp, in partnership with UJA Federation of New York, Jewish Community Center Association (JCCA), JCamp180, National Ramah Commission (Ramah), and Union for Reform Judaism (URJ).

This report focuses on some key measures of Jewish day summer camps: the campers and enrollment patterns, professional staff, revenue, expenditures, and more. The analysis introduces several composite measures that extend the raw information available in this census.

WHICH CAMPS ARE INCLUDED IN THIS REPORT?

Over the past few years, FJC has begun to expand its scope to work with day camps, building a network similar to overnight camps. Moving forward, we expect the sample of day camps to grow. FJC's working definition of day camps participating in the Census report and to be included in the new network is:

Day camp refers to an entity that provides programs on a scheduled basis during the summer months for children 3 years of age and older, offering multiple week summer experiences, and is encouraging of multi-year camper participation for at least 4 consecutive summers. In addition, day camps should satisfy the following criteria:

- Day camps should have an explicit Jewish mission, celebrate or explore Shabbat in some manner, create a knowledge of or connection to Israel, and have operated for at least one camp season.
- Operate in the USA or Canada and have their own certificate of insurance
- Register as or part of an organization with 501(c)3 status, or Canadian equivalent.
- Demonstrate good governance and sustainability by having written governance policies, an active board, and a financial plan and/or budgets that demonstrate fiscal health.

The FJC Day Camp Census 2016 findings represent day camps during Summer 2016. The results are derived from 130 surveys, an increase of 22 more camps participating than in 2015 day camp survey administered by JData. FJC believes the field of Jewish day camp is larger and expects the sample to grow as they build more connections in the next few years.



Some questions were not required on the Census form, resulting in certain data points producing fewer responses. FJC augmented the sample of completed survey data with information from additional camps that submitted some data. Where appropriate, the results are compared to 2015 camp survey and analysis.

ABOUT THE CAMPS

The sample in the FJC Day Camp Census 2016 is largely comprised of JCCA-affiliated day camps (90). An additional 13 camps are affiliated with other movements, and 14 reported as independent.

Affiliation of Participating Day Camps

	2015	2016
JCCA	82	90
All other	18	27 (See breakdown below)
Total	95	117

Breakdown of the 2016 Sample of Non-JCCA Day Camps

	2016
National Ramah	4
Chabad	3
URJ	2
Young Judaea	1
B'nai Akiva	1
Other	2
Independent/No affiliation	14
Total	27

*The breakdown of non-JCCA day camps is not available for the 2015 data set.



JEWISH DENOMINATION

Nearly half the camps (57) define their denomination as “Community” and another 14 as “Pluralist or Transdenominational.” Only a small number of camps see themselves as aligned with the three largest Jewish denominations, Orthodox, Conservative, and Reform (15 in all). The eschewing of ideological or denominational categories in part reflects the nature of the market for day camps. Although the day camps are sponsored by Jewish agencies and institutions and are attended by mostly Jewish campers, Jewish day camps are community based and appeal to a range of campers from varied religious affiliations and religious and ethnic backgrounds.

Denominational Movement	Camps Aligned with Denomination
Orthodox	2
Community	57
Conservative	8
Pluralist or Transdenominational	14
Reform	5
Secular	7
Sephardic	1
Traditional	3
Zionist	2
Other	18
Total	117

GRAPHIC DISTRIBUTION

Nearly half of the day camps are located in the Northeast (53) with the other US camps almost equally divided among the major regions of the country and an additional 7 are located in Canada. This distribution more closely resembles the geographic distribution of the Jewish population across North America than Jewish overnight camps. After all, the day camps serve local populations of Jews and others within their communities.

Region	2015	2016	Difference
Northeast	45	53	8
Midwest	23	22	-1
South	14	17	3
West	14	18	4
Canada	2	7	5

CAMP SIZE

Camps vary widely in size and, as we shall see, camp size is related to a number of important characteristics. On the low-end of the spectrum, nearly a third of the day camps in our sample (28%) served under 300 campers during summer 2016. At the other end, 20% of the camps served more than 700 campers.

Size of Camp by Percentage of Day Camps and Campers

Size of Camp	Percentage of Camps	Percentage of Campers
Under 300	28%	9%
300-499	30%	24%
500-699	22%	26%
700 or more	20%	40%
Total	100%	100%

While as many as 28% of camps served the smallest range of campers, just 9% of the campers in Jewish day camps in our sample attend such camps. The largest camps (enrollment of 700+) are the venues for 40% of the campers.

DAY CAMP AND CONNECTIONS TO OTHER JEWISH EXPERIENCES

The vast majority (97%) of camps surveyed are connected to an early childhood center (ECE). Nearly a third (29%) of Jewish day camps responded that they have ties to a Jewish overnight camp. These relationships can help advance children and young families on their Jewish journeys, with all participating institutions acting as connectors to one another advancing the goal of having ECE children attend Jewish day camp and day camp alumni move on to Jewish overnight camps. It is clear day camps have an interest in fostering relationships with such comparable institutions.

DAY CAMPER ENROLLMENT

In 2016, participating Jewish day camps served 65,488 unique campers. To obtain a reasonable estimate of year-over-year camp growth, we turned to a sub-sample of 47 JCC day camps that submitted enrollment data from 2015 to 2016. From 2015 to 2016, these camps reported a 3% growth (from approximately 30,000 to 31,000 campers), which strongly indicates a likely global growth trend in the Jewish day camp sector throughout North America.

From 2015 to 2016, the sample size of day camps that submitted enrollment data grew from 79 to 130 camps - showing an increase of over 20,000 campers recorded. Adding fifty camps to the sample changed the average camp size from 568 to 503. This decrease is reflective of the variety of camps in the expanded sample.

Reported Day Camper Enrollment

	2015	2016	Difference
Number of reporting camps	79	130	37
Total individual campers	44,890	65,488	20,398
Minimum number of campers	71	44	-27
Maximum number of campers	2,020	2,042	22
Median number of campers	473	441	32
Average number of campers	568	503	-65

In 2016, similar to 2015, camps reported 62% of campers were returning children and 38% were new to the day camp. The stable and high numbers of returning campers can be seen as a healthy sign, pointing to the ongoing demand for Jewish day camps in the marketplace.



Camper Retention

	2015	2016	Difference
New and Returning Campers			
Number of reporting camps	48	114	66
Average percent campers new to camp	39%	38%	-1%
Retention			
Number of reporting camps	55	114	59
Average return rate of eligible campers	66%	62%	-4%

REGIONAL DISTRIBUTION

The analysis divides the camps by five geographic areas North America: Northeast, South, Midwest, West and Canada. The average number of unique campers is the highest in the South (705) and lowest in the Midwest (419).

Breakdown of Regional Distribution

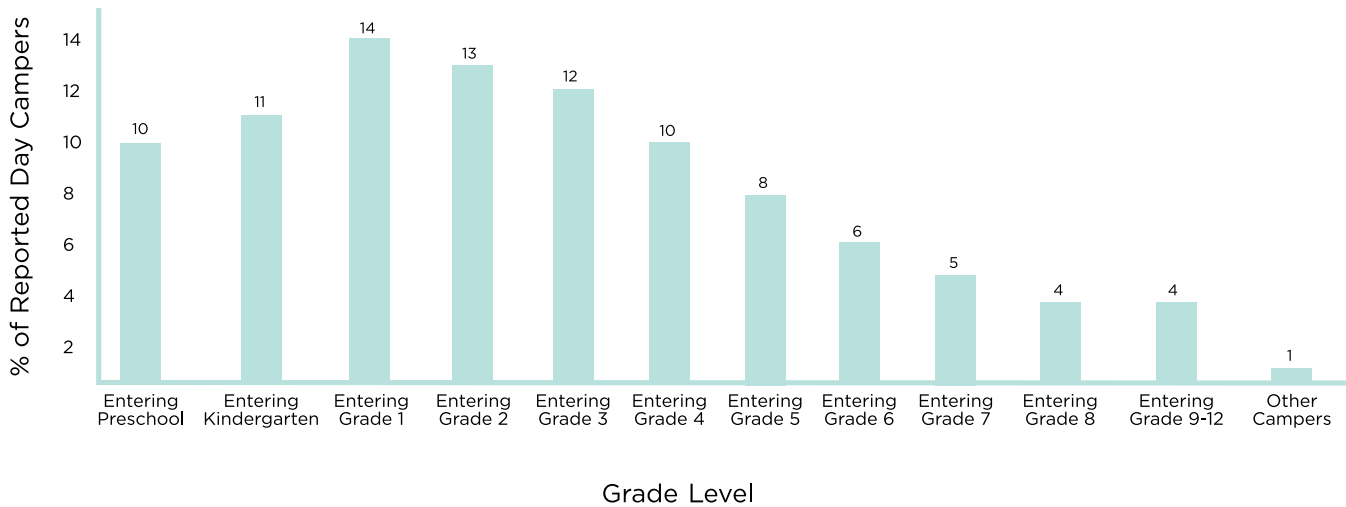
Region	Average number of unique campers per camp
Northeast	502
Midwest	419
South	705
West	440
Canada	509
Total	507



GRADE-LEVEL DISTRIBUTION

As many as 70% of the campers are entering grades four or below, with the peak number of campers entering first and second grade. Together, these two grades account for more than a quarter of all Jewish day campers. Enrollment by grade declines precipitously after grade four, reaching nearly zero among those entering grade 10. As campers age through their day camp program, some take advantage of age-appropriate programming, which could include travel and CIT programs in the upper grades.

Breakdown of Grade-Level Distribution



PROGRAMS

Camps reported over 475 distinct programs as part of their offerings. Of them, 220 were specialty programs, 27 were travel programs, and 18 were special needs programs. Generally, camps reported a decline in the number of programs, which we suspect is a result of differences in survey design between 2015 and 2016. That said, the mix of programs, as classified by the responding day camps, remains largely the same in 2016 as in 2015, albeit with a few variations.

Landscape of Programs

	2015	2016	Difference
Programs Overall			
Number of reporting camps	98	117	19
Overall total number of programs	502	478	-24
Programs by Type			
Total number of traditional programs	199	186	-13
Total number of specialty programs	223	220	-3
Total number of travel programs	43	27	-16
Total number of special needs programs	21	18	-3
Total number of other programs	13	27	14

The variety in specialty programs reflect the interests of elementary aged day campers.

The more widely offered specialties are:

- Adventure Camps
- American Ninja Warrior
- American Red Cross Babysitting
- Aquatics
- Art
- Chess
- Creative Arts: Music/ Theater /Dance / Film/Acting/Circus
- Culinary
- Equestrian
- General and Specialized Sports Instruction (Baseball, Softball, Football, Lacrosse, Tennis, Golf, Swim, Cheer and Gymnastics)
- Hebrew Immersion
- Jedi/Dragon/Harry Potter
- Lego/ Robotics/Rocketry
- Magic
- Martial Arts
- Red Cross Swim Instruction
- STEM
- Travel

CHILDREN WITH DISABILITIES

Over 3000 campers (3,169) with disabilities attend Jewish day camp, 5% of the overall population of campers. A large majority of camps (83) provide opportunities for campers with disabilities. Within those camps, all offer full inclusion options and 20 camps also offer partial inclusion opportunities.

	Number of Day Camps
Serving campers with disabilities	83*
Only campers with disabilities	4
Full inclusion	83
Partial inclusion	20
Both partial and full	10
Separate program	14
Other	3

*Some of the 83 camps that shared that they are serving campers with disabilities selected more than one way in which those campers are served at their camp.

DAY CAMP STAFF AND COMPENSATION

Jewish day camps in our sample employed about 12,000 staff members (not including Counselors-in-Training), with an average of over 100 staff members per camp.

Staff at Day Camps

Total Staff (not including CITs)	2015	2016	Difference
Number of reporting camps	83	112	29
Total number of staff members	10,295	12,429	1,643
Average number of staff members	124	107	-17



As many as 87% of the Jewish day camps had CIT programs in 2016 (almost equivalent to the 2015 percentage from the 2015 JData report). A line of research points to the educational value of providing Jewish experiences for Jewish adolescents and, presumably CIT programs in Jewish day camps fulfill that objective.¹

CITs at Day Camps

	2015	2016	Difference
Number of reporting camps	85	117	32
Percent of camps with a CIT program	88%	87%	-1%

Over 80% of the staff hold summer-only positions, with under 20% divided between full-time and part-time year-round positions.

Staff Employment Capacity at Day Camps

Part-Time & Full-Time Staff	2015	2016	Difference
Number of reporting camps	83	112	29
Overall percent of staff summer-only	92%	84%	-8%
Overall percent of staff year-round part-time	5%	8%	3%
Overall percent of staff year-round full-time	3%	8%	5%

¹ See, for example, Cohen, Steven M. Fink, Steven. *Building Progressive Zionist Activists: Exploring the Impact of Habonim Dror*. Habonim Dror Camp Association. 1 December 2013: <http://www.bjpa.org/Publications/details.cfm?PublicationID=18607>

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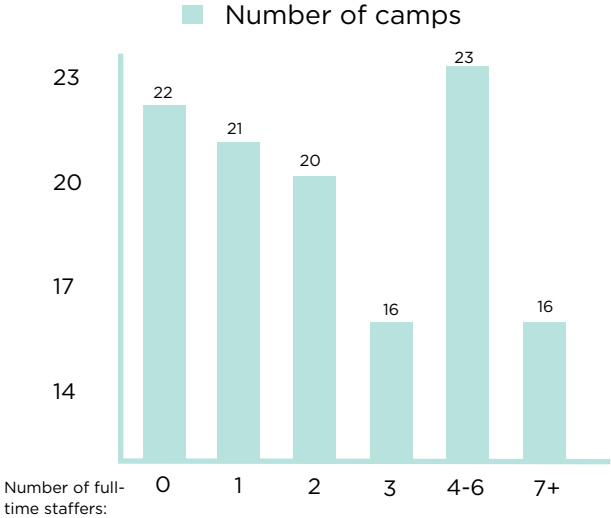
The top professionals at the camps within our sample devote an average of 89% of their professional time to their day camp jobs. Many day camp professionals working at JCCs have various responsibilities within the organization alongside their work leading the day camp.

Dedicated Time of Top Day Camp Professionals

Top camp professional dedicated time	2015	2016	Difference
Number of reporting camps	79	114	35
Average percentage of top camp professional’s time devoted to day camp	66%	89%	23%

The number of camps with year-round full-time staff is given below. Over 80% have at least one such staff member, and the median number of such staff is two.

Total Number of Unique Year-Round Full-time Staff



Note: this may include full-time staff that work at camp and have other responsibilities in their portfolio.

COUNSELOR SALARIES

Respondents reported on both minimum and maximum salaries for unit counselors, ranging between lowest salary points averaging \$1,700 and highest salary points averaging \$3,600, respectively. Salaries are highest among day camps in the West, followed by Canada. Adjusting, however, for the Canadian dollar brings Canadian salaries more in line with the regions of the US aside from the West.

Average Maximum and Minimum Counselor Salaries by Region of Day Camp

Region	Maximum	Minimum
Northeast	\$3,345	\$1,252
Midwest	\$3,514	\$2,062
South	\$3,796	\$1,595
West	\$4,501	\$2,938
Canada	\$4,079	\$1,980
Average	\$3,635	\$1,701

As might be expected, salaries vary by size of camp.

Average salaries for unit counselors are lower in the smallest camps (under 300 campers) where the average minimum is about \$1400 as compared with over \$1700 in camps with 300 or more campers. The smaller camps also report lower average maximum salaries of almost \$3100, as against about \$3800 in camps with 300 or more campers.

Average Maximum and Minimum Counselor Salaries by Size of Day Camp

Size of Camp	Maximum	Minimum
Under 300	\$3,093	\$1,390
300-499	\$3,928	\$1,987
500-699	\$3,762	\$1,704
700+	\$3,771	\$1,662
Total	\$3,635	\$1,701



DAY CAMP TUITION, REVENUE, & FINANCIAL AID

Maximum weekly tuition in Jewish day camp averages \$470 with a median cost of \$403. We did not see an increase in average cost over 2015, even adjusting for the increased sample.

In 2016, weekly tuition ranged from a low of \$150 to a peak of \$1395.

Day Camp Tuition

	2015	2016	Difference
Number of reporting camps	63	102	39
Average maximum weekly tuition	\$468	\$470	\$2
Minimum weekly tuition	\$217	\$150	-\$67
Maximum weekly tuition	\$1,465	\$1,395	-\$70
Median weekly tuition	\$410	\$403	-\$7

Total revenue average is highest in the Northeast (at about \$1.5 million), nearly three times the average in the West.

Average Revenue by Region

Region	Total Revenue
Northeast	\$1,508,983
Midwest	\$610,513
South	\$1,126,954
West	\$250,238
Canada	\$784,412
Overall Average	\$1,107,708



The largest camps (with 700 or more unique campers) average higher weekly tuition charges (\$551) than the smaller camps (averaging between \$427 and \$479).

Tuition by Size of Camp

Region	Maximum weekly tuition for summer 2016 core program
Under 300	\$479
300-499	\$442
500-699	\$427
700+	\$551
Total	\$471

For the 82 day camps reporting financial details, total revenue amounted to over \$90 million for summer 2016. If we factor in an estimate to take account of the additional non-reporting camps in the survey, we would bring the industry total to approximately \$140 million.

The vast majority of revenue (90%) is derived from tuition, similar to what was reported in the 2015 JData study.

FINANCIAL AID

Nearly \$8 million in financial aid was awarded (with 108 camps reporting), a figure higher than that reported in 2015, in large part owing to the growth in the number of camps providing such information.

The 108 camps in 2016 distributed \$67,000 per camp in financial aid, divided on average among 115 campers. The average award was almost \$600 per camper*.



Day Camp Financial Aid

	Data Collected
Number of reporting camps	108
Sum total financial aid disbursed	\$7,874,000
Average total financial aid	\$67,000
Average total unique campers receiving aid	115
Average percent campers receiving aid	21%
Average financial aid award	\$583

The average number of campers receiving financial assistance is highest in the South (272) and lowest in the West (57).

Number of Campers Receiving Financial Assistance by Region

Region	Average unique number of campers receiving financial assistance
Northeast	98
Midwest	71
South	272
West	57
Canada	188
Total	116

*The 2015 used different questions to estimate financial aid disbursements. The change in question wording obviates the possibility of making over-year comparisons.



DISTRIBUTION OF JEWISH CAMPERS

About 63% of campers are identified as Jewish as identified and defined by the survey respondents. An equivalent percentage of staff members are also identified as Jewish, with day camp directors more likely to be identified by respondents as Jewish (84%) than the general camp staff. About a quarter of campers come from interfaith¹ families (one parent Jewish and one parent not Jewish).

Jewish Population at Day Camp

	2015	2016	Difference
Number of camps reporting	74	117	43
Estimated percent of campers that identify as Jewish		63%	
Estimated percent of all campers whose parents identify as interfaith		24%	
Average percent Jewish counselors	56%	63%	
Percent of camp directors who are identified as Jewish	85%	84%	

The proportion of campers who are identified by respondents as Jewish is somewhat higher in the South (71%) than in the other regions (59%-64%). The percent whose parents are interfaith or intercultural is lowest in Canada (15%), reflecting the low rates of intermarriage in Canada in general. In comparison, in the US, regional rates fluctuate in a narrow range (22% to 26%).

The proportion of staff who are identified by respondents as Jewish varies little by region (59% -66%).

Jewish Population Characteristics by Region

	Northeast	Midwest	South	West	Canada	Total
Jewish camper %	61%	59%	71%	64%	63%	63%
Intermarried %	26%	22%	24%	26%	15%	24%
Jewish staff %	64%	59%	66%	64%	63%	63%
Intermarried % of Jewish campers	49%	40%	38%	43%	25%	43%

¹ The term “interfaith” here refers to all types of marriages between Jews and others, including those where one or the other spouse identifies with no religion, in what might be termed, “intercultural” marriages.



While the proportion of staff that is identified by respondents as Jewish hardly varies by size of camp, size is indeed related to the proportion of campers who are Jewish and the proportion who are children of interfaith parents. The largest camps report the highest proportion of Jewish campers (72% vs. 57%-63% for the other size categories). These camps also report the lowest proportion of campers from interfaith homes (19%, followed by 21% for camps of 500-699 campers and 27% for the smaller camps).

Jewish Population Characteristics by Size of Camp

	Under 300	300-499	500-699	700+	Total
Jewish camper %	63%	62%	57%	72%	63%
Intermarried %	27%	27%	21%	19%	24%
Jewish staff %	69%	58%	57%	68%	63%
Intermarried % of Jewish campers	50%	50%	40%	27%	43%

We calculated the extent to which the children of the interfaith parents comprise a fraction of the Jewish camper population. While they are 24% of all campers, they make up 43% of Jewish campers, not all that distant from their likely proportion in the Jewish population as a whole, as data from the 2013 Pew study of Jewish Americans indicates that 56% of non-Haredi Jews 18-29 are the children of intermarriage (excluding a small number of converts from the calculations).

Focusing on the percent of Jewish campers who are children of the interfaith parents, we find just 27% among campers in the largest camps, as against almost twice that number in camps with under 500 campers (50%). One possible reason for this difference is that larger camps may more often be located in areas of high Jewish density, while the smaller camps may well be found in areas with lower residential concentrations of Jews. The inmarried and intermarried are similarly distributed with more inmarried found in the more densely concentrated Jewish neighborhoods, metropolitan areas, and regions while the intermarried tend to be found more distant from Jewish institutions and Jewish friends and neighbors.



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Lastly, we would like to thank the 160 nonprofit Jewish overnight camps that offer over 80,660 campers transformative Jewish summer experiences, strengthening their connection to each other and their essential Jewishness.

ABOUT THE FOUNDATION FOR JEWISH CAMP

The key to the Jewish future is Jewish camp. We know from research—and nearly two decades' experience—that this is where young people find Jewish role models and create enduring Jewish friendships. It's where they forge a vital, lifelong connection to their essential Jewishness.

Suddenly, all those Shabbat song sessions and campfire stories take on new importance—and urgency. So we're devoted to helping Jewish camps and summer programs thrive. We gather data, build new programs, provide operational support and help recruit campers. We've elevated camp management into a true profession. And we work to elevate Jewish camp on the cultural and philanthropic agenda.

In short, our mission is to help Jewish camps achieve their mission: to create transformative experiences—and the Jewish future.

ABOUT THE AUTHOR

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STEVEN M. COHEN is Research Professor of Jewish Social Policy at HUC-JIR, and Director of the Berman Jewish Policy Archive @ Stanford University. In 1992 he made aliyah, and taught at The Hebrew University, having previously taught at Queens College, Yale, and JTS.

Among his books are The Jew Within (with Arnold Eisen), Two Worlds of Judaism: The Israeli and American Experience (with Charles Liebman), and Sacred Strategies: Transforming Synagogues from Functional to Visionary (with Isa Aron, Lawrence Hoffman and Ari Kelman, Isa Aron, Lawrence A. Hoffman. He was the lead researcher on the Jewish Community Study of New York: 2011, and consultant to the Pew studies of American Jews and Israeli society.

Prof. Cohen received an honorary doctorate from the Spertus Institute of Jewish Studies, the Marshall Sklare Award, and a National Jewish Book Award, and served as president of the Association for the Social Scientific Study of Jewry, 2012-16.

Married to Rabbi Marion Lev-Cohen, Marion and Steven live in Jerusalem and New York.

