

JWest Program Evaluation

June 15, 2009

Introduction

This presents the first interim evaluation of the JWest Campership Program. As JWest enters its second summer, a total of 1,346 first-time 6th-8th grade campers have been enrolled--720 in 2008 and 626 (to date) for 2009. As of June 15, 403 out of last year's 720 first-time campers (56%) are returning for a second summer. All of these results are well below the goals set for the program at its inception. This evaluation explores the reasons for these shortfalls and whether adjustments, both structural and operational, must be implemented going forward in order for JWest to achieve its goals.

Using the program's "Theory of Change" document as our foundation, this evaluation is organized into 3 sections:

- I. "Creating and retaining campers" examines the numeric "trial" and "retention" goals and whether they are achievable within the program's current design;
- II. "Reaching deeper into the Jewish community" looks at whether targeted JWest efforts have broadened the ethnic and socio-economic camper profile; and
- III. "Building Jewish pride, 'connectedness', and identity" looks at what we know so far regarding our annual process benchmarks and long-term outcomes specifically regarding the *actual* summer camp experience and whether it is contributing to greater year-round Jewish involvement.

Summary

1. We believe current first-year enrollment and second-year retention goals are unachievable under current program guidelines. There are many contributing factors but primarily, restrictive eligibility requirements are significantly reducing the prospective JWest applicant pool. Secondly, the lower income profile of JWest recipients and their difficulty in affording camp, even with incentives, has made the program especially vulnerable to the economic downturn.
2. JWest is meeting its objective of attracting a more diverse mix of families to Jewish camp. Although many recipients share a profile that's similar to other families attending JWest camps, we are seeing some significant differences on almost all religious, nationality, and socio-economic measures.
3. Early indications are that the first-time Jewish camp experience made possible by JWest is achieving programmatic goals. Contrary to what might be concluded given the disappointing return rate, our research shows that JWest recipient campers *loved* camp in 2008, more than 80% *wanted* to return, and as we had hoped, many have *increased* their level of "Jewish engagement" during the school year that followed.

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Detailed Discussion

I. Creating and Retaining Campers

As of 6/15/09:

2008 first year campers:	720	-28% vs. 1,000 new camper goal
2009 first year campers:	626	-43% vs. 1,100 new camper goal
2008 campers returning in 2009:	403	56% retention vs. 80% goal

We believe that the goals for both the first-year camper enrollment and subsequent-year retention were (and are) unrealistically aggressive and unachievable:

1. Incentive programs used elsewhere and the results they've achieved are not necessarily projectable to JWest. As we understand it, the first-year enrollment goals were based, in part, on experiences in other U.S. markets, most notably Chicago. Given the enrollment achieved in those more limited markets with smaller incentives (as compared to JWest's expansive geography and higher incentives), the goal of 1,000 per year seemed reasonable and achievable. In retrospect however, it's now clear that many of those programs were far less restrictive than JWest, targeting a broader cross-section of the Jewish population.

Specifically, unlike these other incentive programs, JWest narrowed eligibility in 2 important ways: 3+ week sessions (as did the Midwest but their "norm" tends to be 4 weeks vs. the Western U.S. where 1 and 2 week sessions are more widely available and accepted); and to 6th-8th graders (vs. the Midwest where there were no grade restrictions. These eligibility requirements were not arbitrary--each had its own rationale—but all served to reduce the Western prospect population considerably, thus rendering the experience in other markets less projectable to JWest.

2. 3+ week session requirements for incentive-eligibility have proven to be a significant barrier to enrollment, both for parents as well as the camp directors themselves. Moreover, we strongly believe that all future enrollment goals are unlikely to be achieved should these requirements continue. We should acknowledge that while we are arguing the case for incenting 2 week sessions, we cannot predict whether this will compromise *other* desired outcomes of the program (i.e. year-round activities and involvement, building stronger Jewish identity). Nevertheless, while few can argue the merits and potential benefits of encouraging longer sessions...

- There is limited but compelling evidence to suggest that such a change will go a long way towards meeting enrollment goals. Of the 19 participating camps, 3 (Shwayder, JCC Ranch, and Mountain Chai) have used JWest incentives towards two-week sessions. Their first-year enrollment numbers via JWest have more than doubled, growing from 54 in 2008 to 111 this year. By contrast, the trend during this same period at the remaining camps, all restricted to 3+ week session funding, has been a JWest enrollment *decline* of 23%.
- There is also evidence, again from the small base of these three camps, that retention goals may be more achievable when 2 week sessions are included. Separating their data from the JWest total shows second-year enrollment among 2+ week campers at 72% versus 54% for 3-week campers.
- Camp directors throughout the Western region have argued from the beginning that their "culture" is one of providing 1 and 2 week session options to meet the desires and demands of Western Jewish families. As such, requiring longer (and more expensive) sessions as a condition for JWest funding has made the program a "tougher sell" and has led some camp directors to (*indefensibly*, in our opinion) support the JWest initiative with

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mented enthusiasm and effort. This is difficult to quantify precisely but after reviewing, in depth, the field experiences and discussions between various camp directors and FJC program leaders, we strongly believe this has been a limiting factor in both first-year enrollment as well as retention.

- In fact, the revelation (via recent FJC phone contact with 2008 JWest recipient families who had not yet applied in 2009) that over 10% were *unaware* of the second year incentive confirmed to us that some camp directors had dropped the ball. As we noted, given the generosity of the incentives (with no matching requirement for the camps), the continuity offered by a two-summer incentive, and the resources made available to camps by the program, it's hard to understand or condone such negativity. Nevertheless, we believe a relaxation of session-length requirements will go a long way towards overcoming this issue.

3. While reports nationally suggest that many camps are holding steady despite the poor economy, the fact that JWest successfully “reached deeper” into the Jewish community has unintentionally (and ironically) left the program more vulnerable to the recession. Specifically, the unintended consequence has been enrollment of campers from more modest means--almost half fall into lower income (i.e. under \$100K) segments, a level that's significantly below most other camp families, both regionally and nationally.

To be clear, the income profile for JWest recipient families (and camp families in general) is still higher than U.S. averages. And, shortfalls cannot and should not be attributed simply to the state of the economy. Nevertheless, this income disparity between JWest recipients and the rest of Jewish camp families is striking and significant, even when compared to other campership incentive recipients elsewhere in the country. (See Exhibit A for details.)

As such, we believe many of the target families have less disposable income, are less likely to be feeling financially secure, and therefore less capable (real or perceived) of affording a first year of camp or, despite their child's positive experience, a return-engagement this summer. Moreover, this may be magnified by JWest's geography since a majority of families come from California, one of the nation's hardest-hit states. Research supports our belief that the impact of the economy must be acknowledged:

- As compared to just 19% of incentive recipients nationally, over 50% of JWest recipients told us, quite definitively, that their child would not have attended camp in 2008 without the incentive, *almost all saying that the funding helped overcome financial/affordability issues*. And this “dependence” on the incentive was highest—almost 80%--among the lowest JWest income segments. (See Appendix B for details.)
- Not surprisingly, all of this directly affects the percentage returning for a second year. Ironically, if it was just up to kids, retention would *not* be an issue. But unfortunately, while 86% of campers who received a JWest incentive said they wanted to return, only 59% of their parents said they were extremely likely to do so. The issue once again is financial: about half of those unlikely to send their children back (as measured shortly after the end of last summer) cited affordability as their biggest concern. This came up significantly more often for JWest parents than it did for other families who didn't think their child would be returning.
- In research conducted 7 months later, about one third of those unlikely to return were still discussing the difficulty of affording camp. In fact, it came up at almost three times the level of any other reason.

We also have serious doubts about the likelihood of meeting the 3rd year goal—75% retention of Year 2 campers—when the incentive disappears. Obviously, if the Year 2 incentive of \$1,000 is being perceived by many parents as insufficient and retention is running below 60%, offering *nothing* in Year 3 will probably lead to an even *steeper* drop, *well below* the 75% retention goal that has been established.

4. Overall, we do not believe shortfalls in first-time enrollment and retention have been the result of ineffective marketing. While there are several opportunities to improve (noted below), overall JWest creative and media

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strategies seem sound. Message content has been consistent and delivered frequently and in appropriate vehicles, ranging from personal contact, postcards, posters, and conventional mail, to online communication and various internet sites. Data from the onehappycamper.org application web site and our own research show the camps and other Jewish organizations to be primary sources for JWest information. Given that many cite multiple sources, it's *also* clear that information is coming from a lot of different directions and that's a *good* thing, since it's well established that affecting behavior (in this case, deciding on camp and applying for the incentive) requires frequency and repetition.

Nevertheless, we encourage FJC's focus on the following areas and we will be tracking them closely going forward:

- Delivering marketing materials and recruitment training when they can make a difference – The marketing materials need to be developed, produced and distributed to the camp directors immediately after the current camp season. Likewise, any recruitment training needs to be scheduled right after the current camp season, but no later than October, when recruiting for the *next* camp season begins.
- Tracking actual usage and impact of individual program elements – Onehappycamper.org and additional research among JWest recipients has helped identify, in relatively general terms, where applicants are learning about the JWest program. Because for practical reasons, none of the specific materials incorporate any type of coding for tracking purposes however, (e.g., coupon or promotion codes), our assessment of the program elements individually and as a group are more conjectural than fact-based. As such, we will be concentrating our efforts this Fall (beginning at the September director meeting) on exactly how each of the camps used the marketing materials that were provided, assess their effectiveness to whatever degree possible, and provide feedback to the FJC and their creative agency.
- Assessing training topics, content, and materials to ensure that they're useful to camps – While research was conducted among the Camp Directors to try to assess the usefulness of the training offered, many did not respond. That said, the results were very mixed regarding the impact/benefit of the training. This is another area we will be focusing upon more closely after the current camp season is completed.
- Including camper and parent feedback in the development of creative materials and communications – The best marketing is accomplished when the needs of the target audience are thoroughly and effectively addressed—in this case with feedback from campers and parents. We encourage the FJC and its agency to incorporate such feedback in their development process for all marketing materials. In addition, there is the opportunity for alternative creative approaches. For example, given the importance of “word of mouth”, expansion of techniques like peer testimonials or parent “ambassadors” should be considered.
- Crafting targeted messages and materials that distinguish between recruitment (i.e. “trial”) and retention (i.e. “customer loyalty”) - Recruiting and retention are two very different objectives, normally accomplished with different types of marketing vehicles and messages. Trial is all about “selling” and ensuring that the target audience is both aware and interested in the “product” that is being sold. Retention is all about “keeping the customer” which, in this case, involves reminding the camper what a great experience he/she had and removing any obstacles for returning. These two objectives can best be achieved through individually customized approaches.
- Identifying what's working and establishing “best practices” for all who are doing the same job – In reviewing all of the research and reports, it was obvious that there were some things being done very well by certain recruiters and/or specific camps. For example, Tawonga's reinforcement of Year 2 incentives by immediately following up with Year 1 recipients at the end of camp is, in our opinion, an excellent way to make sure no first year camp family from 2009 is unaware of the incentive available to them in 2010.) These types of “best practices” need to be collected and shared with strong direction to do those things that work and to do them in the way they are working. (The necessary challenge will be to overcome the typical “not invented here” biases.) Once these “best practices” are established, standards can be put into place to evaluate compliance and results.

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These “best practices” can also be reviewed, updated, and republished to ensure constant improvement to the process and the overall program.

- Ensuring that marketing messages and materials are available to reach a more diversified mix of campers— There are specific JWest objectives related to “targeting efforts by market that reach deeper into the Jewish community.” As discussed below, we are showing real progress in this area but to continue progressing, this must be maintained as an important focus area.

II. Reaching Deeper into the Jewish Community

JWest incentives are helping to create a more diverse mix of families at Jewish camp. Our research among recipients versus the balance of Western camp families and families in other incentive programs shows them to be:

- More interfaith--30% were interfaith families vs. 19% of the balance of Western camp families.
- Less first generation U.S.--66% were families where both parents were born in the U.S. vs. 75% of the balance of Western camp families.
- More Russian (12%) and less “Other Ashkenazic” (47%) vs. 5% and 57% respectively of the balance of Western camp families.
- Somewhat less affiliated--81% were temple/synagogue members vs. 92% of CIP (Campership Incentive Program) recipients nationally; 21% were JCC members vs. 27% of CIP recipients nationally.
- New to Jewish camp--52% were families where at least one parent had attended Jewish overnight camp themselves vs. 66% of the balance of Western camp families.
- Probably as a by-product of what’s shown above, lower income--48% were under \$100K HH income vs. 24% of the balance of Western camp families. The ramifications of this have been discussed previously in this evaluation.

III. Building Jewish “Connectedness”, Pride, and Identity

While it is premature to draw any conclusions about camp’s influence on building identity and connections, early feedback from the 2008 summer cohort is encouraging. Longitudinal research among camp families is now underway that tracks attitudes and behaviors regarding Jewish identity but it will be several years before we can meaningfully interpret those findings. In the mean time, annual research studies that assess the actual camp experience and monitor school-year “engagement” in Jewish life and activities have shown that:

- For the vast majority of those who attended in 2008, camp has been an overwhelmingly positive experience. Ratings from JWest recipient families (both parents and campers) have been strong and on-par with those from all other JWest camp families. As cited earlier, most of the campers (87%) agreed that it was “a place you want to go to for another summer.”
- 80% of campers also completely agreed that camp was “a place where you were proud to be Jewish.”
- Recent research has shown that 95% of campers have at least *some* level of involvement in temple-related activities, 76% in community/service/volunteer-related activities, and 45% in JCC/social-related activities.
- For many, camp has helped stimulate *greater* involvement. Since last summer’s experience, 56% reported they were *more* involved in at least one temple-related activity, 38% in at least one community/service/volunteer-related activity, and 20% in at least one JCC/social-related activity.
- 60% cited involvement in at least one activity during the school year specifically related to camp and/or fellow campers.

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What's less clear is the role JWest-sponsored "engagement opportunities" (e.g., programs created by BBYO) have played in all of this as those efforts have varied considerably by market. Together with the FJC, we will be looking closely at the experience thus far and identifying opportunities for additional program development.

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APPENDIX A

Comparison of income profile between JWest recipients, recipients of other incentive programs elsewhere in the U.S., Western camp families in total, and camp families in the balance of the U.S.

	JWest ROLI/RP*	Nat'l CIP Study**	CSAT West 2008***	CSAT Bal US 2008****
Under \$50K	21%	8%	8%	6%
\$50-\$100K	27	26	16	15
NET: Under \$100K	48	34	24	21
\$100-\$150K	18	20	15	14
\$150-200K	8	14	10	9
\$200K+	7	8	17	18
Chose not to answer	19	24	34	38
	100%	100%	100%	100%

* Role-of-Incentive/Recipient Profile Study among JWest recipient parents, 2009

** National Campership Incentive Study--no Western programs included, 2008

*** Total 2008 Camper Satisfaction Study sample from JWest camps only (which includes JWest recipients)

**** Total 2008 Camper Satisfaction Study national sample excluding JWest camps

Comparison of income profile between JWest recipients and the families of 6th-8th graders in JWest camps and in camps throughout the balance of the United States who did not receive any kind of incentive:

	CSAT JWest Recip 2008	CSAT JWest Camps 2008	CSAT Bal US 2008
Under \$50K	17%	0%	1%
\$50-\$100K	29	10	8
NET: Under \$100K	46	10	8
\$100-\$150K	18	14	15
\$150-200K	5	10	12
\$200K+	3	24	21
Chose not to answer	28	40	43
	100%	100%	100%

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APPENDIX B*Likelihood to Go to Camp in 2008 If JWest Incentive Had NOT Been Available by income segments*

	Under \$50K	\$50-\$100K	\$100-\$150K	\$150K+	No answer
5 Extremely	6%	2%	5%	16%	11%
4	1	3	8	14	11
3	1	7	19	22	12
2	9	18	15	17	21
1 Not at All	78	68	47	28	40
Not sure	5	2	6	3	5
	100%	100%	100%	100%	100%

Likelihood to Return to Camp in 2009 by income segments

	Under \$50K	\$50-\$100K	\$100-\$150K	\$150K+	No answer
5 Extremely	42%	58%	59%	71%	53%
4	17	11	11	9	12
3	10	9	8	5	4
2	10	12	7	3	6
1 Not at All	9	8	15	7	20
Not sure	12	2	0	5	5
	100%	100%	100%	100%	100%