



Outdoor Ministries Connection
2020 Director Survey



PRESBYTERIAN CHURCH CAMP
AND CONFERENCE ASSOCIATION

PCCCA Supplemental Data Report

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About this Report:

This report is designed as a supplement to the 2020 OMC Director Report, which summarizes data from 321 respondents representing 376 outdoor ministry sites across six outdoor ministry associations affiliated with Outdoor Ministries Connection (OMC). Partnering associations included United Methodist Camp and Retreat Ministries, Lutheran Outdoor Ministries, Presbyterian Church Camp and Conference Association, Episcopal Camps and Conference Centers, Outdoor Ministry Association of the United Church of Christ, and United Church of Canada Outdoor Ministries. For complete results and more thorough data analysis, see the full report, which had a 91% completion rate and a 54% response rate.

This report supplement presents data specific to ministry centers affiliated with Presbyterian Church Camp and Conference Association (PCCCA). These data are at times compared with the other OMC ministries that responded and other times compared with past data from PCCCA respondents.

How to use this Report:

Share survey findings with your organization's camp directors...

Discuss key survey findings with your ministry center's staff or board of directors...

Compare your site's philosophy and statistical data with the larger camping network...

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HIGHLIGHTS

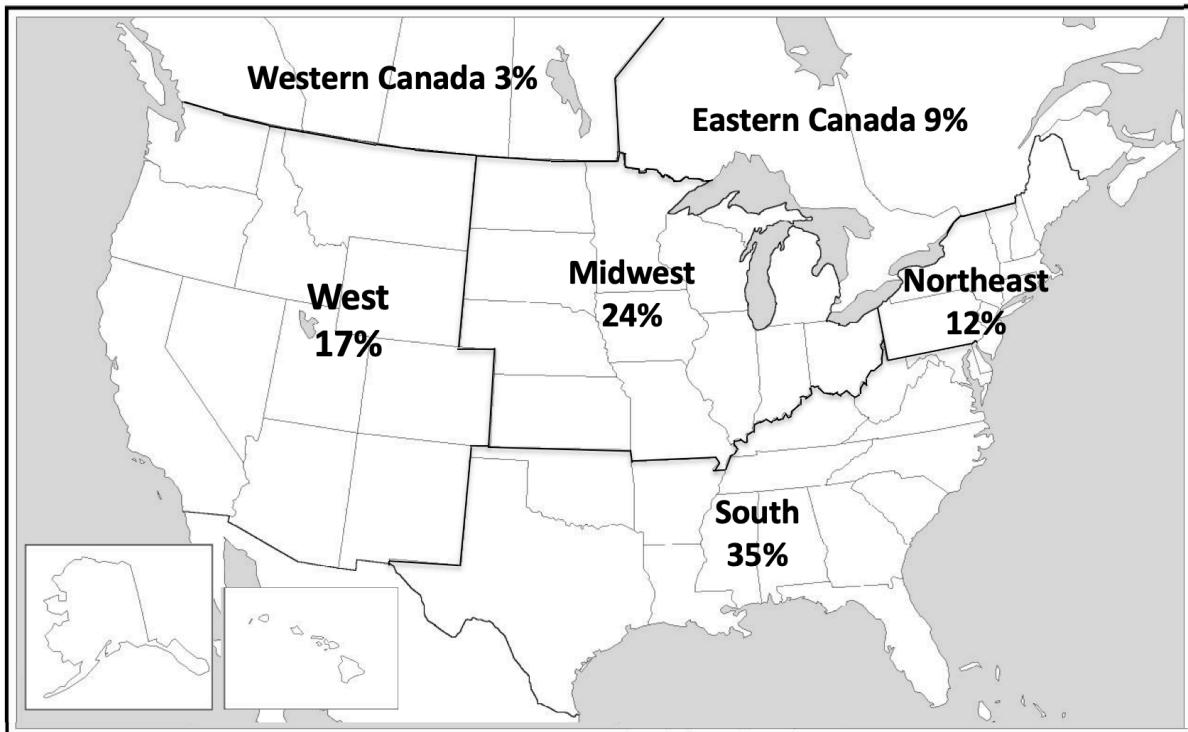
1. PCCCA represents a diversity of outdoor ministries, varying greatly in size, clientele, and degree to which faith and specific theological traditions are emphasized. The variability is generally greater than in other OMC-affiliated organizations.
2. The COVID-19 pandemic had dramatic effects on all aspects of PCCCA ministries. There were widespread cuts of staff and reduction in overnight guests for summer camp and retreats. There were tens of millions of dollars lost across the network. However dramatic, these declines were generally less pronounced among PCCCA ministries than many of their OMC colleagues.
3. Most directors were very or extremely confident that their organization would be around in two years, indicating widespread confidence about the future. COVID-19 mitigation strategies were generally successful in 2020, and most sites planned to welcome guests in summer 2021.

Part 1: General Camp Statistics:

58 responses represented **60 unique ministry sites** affiliated with PCCCA

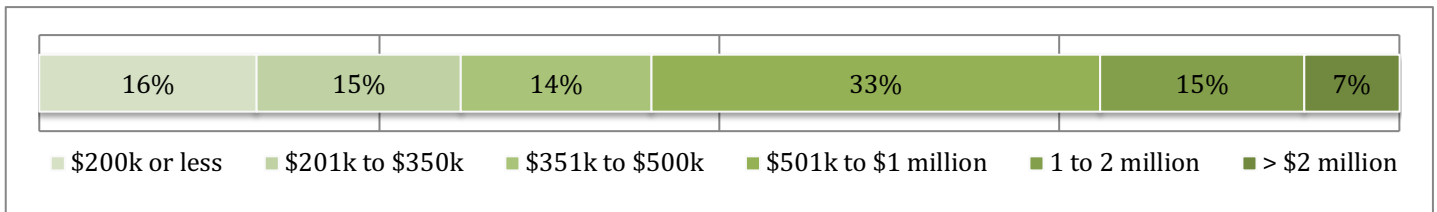
- 83% of respondents indicated affiliation with the Presbyterian Church (USA), and 12% were affiliated with the Presbyterian Church in Canada. Remaining respondents indicated that they were non-denominational or affiliated with multiple denominations.
- Responding sites represented 32 US states and 4 Canadian provinces
- 81% of respondents were camp directors, with the remainder associate directors (6%), program directors (7%), or other staff/board members.

Figure 1: PCCCA Respondents, by Region, n=58



Budget:

Figure 2: Percentage of Outdoor Ministries, by Annual Operating Budget, n=58



General Ministry Overview:

- 79% Combination of youth/child summer camping and year-round retreats/conferences
- 16% Primarily youth/child camping
- 5% Primarily user groups and rentals

Property Size (Acreage):

- 12% owned or leased less than 50 acres of property
- 16% had 50-100 acres
- 33% had 101-250 acres
- 27% had 251-500 acres
- 12% had more than 500 acres

Full-time, year-round Employment (prior to the pandemic):

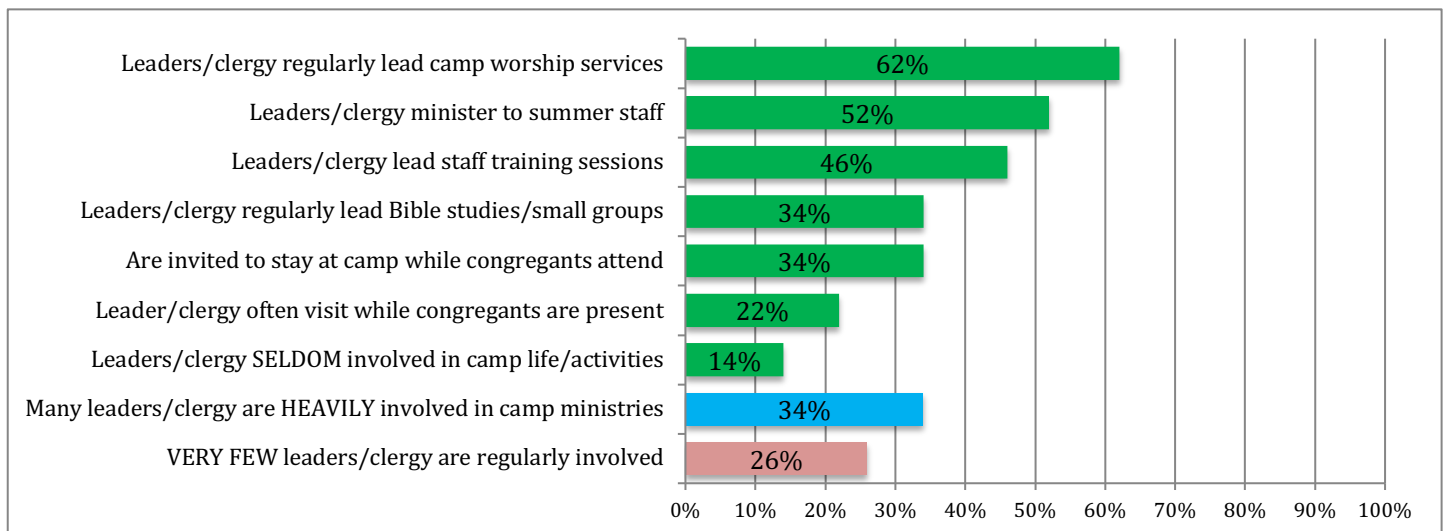
- 5% had no full-time staff members
- 16% employed 1 full-time staff member
- 28% employed 2-3
- 16% employed 4-5
- 18% employed 6-10
- 17% employed 11 or more

Employment Summary (full-time and part-time year-round staff, prior to pandemic):

- A third of these ministries operated with 5 or fewer paid staff members
- Another third had 6-15 staff
- The final third operated with more than 15 paid staff members

Accreditation: 39% of U.S. ministries were accredited through the American Camp Association (ACA)
18% were members of Christian Camp and Conference Association (CCCA)

Figure 3: % of Respondents Indicating Various Ways Clergy Members were Involved, n=50



- Combining the above survey items suggests that 30% of responding ministry centers had a low level of clergy engagement, 26% had moderate engagement, and 44% had high or very high levels of clergy engagement.

Outdoor Ministry Type:

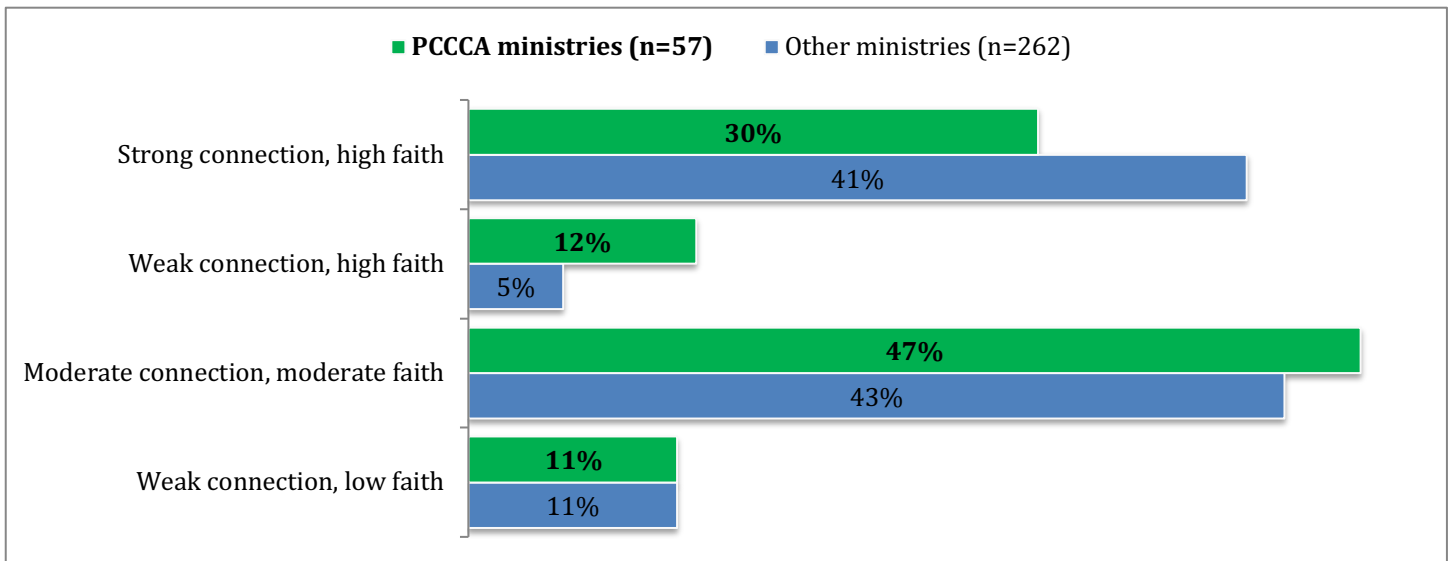
Type 1: Low faith emphasis, weak connection to congregations/denom. ministries

Type 2: Moderate faith emphasis, moderate connection to congregations/denom.

Type 3: High faith emphasis, weak connection to congregations/denominations

Type 4: High faith emphasis, strong connection to congregations/denominations

Figure 4: Prevalence of Outdoor Ministry Type



- As a network, PCCCA organizations tend to show less overall connection to congregational ministries and denominational teachings compared with their colleagues in OMC.
- While about a third of PCCCA organizations maintain strong connections to congregational ministries combined with high faith emphasis, the trend toward moderate connections and faith emphasis continued, with Type 2 organizations making up almost half of respondents in 2020 (compared with 43% in 2018 and 24% in 2016). The steady increase in Type 2 organizations has been, in general, at the expense of Type 3 organizations, suggesting a connection between weaker connections to congregational ministries and a moderation of faith emphasis over time.

Camp and Retreat Center Directors

- **98%** were white, **2%** people of color
- **66%** male, **34%** female
- Education: 43% bachelor's degree, 48% master's degree or higher
 - This level of education was generally higher than other OMC organizations, only 35% of which had directors with a master's degree or higher
- 30% had received **no formal theological education**
- 28% had a masters of divinity degree (higher than other OMC organizations, at 18%)

Figure 5: Director Age

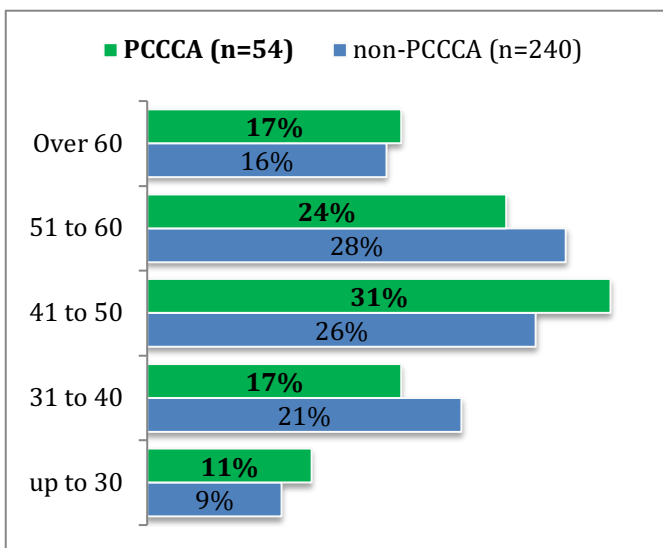
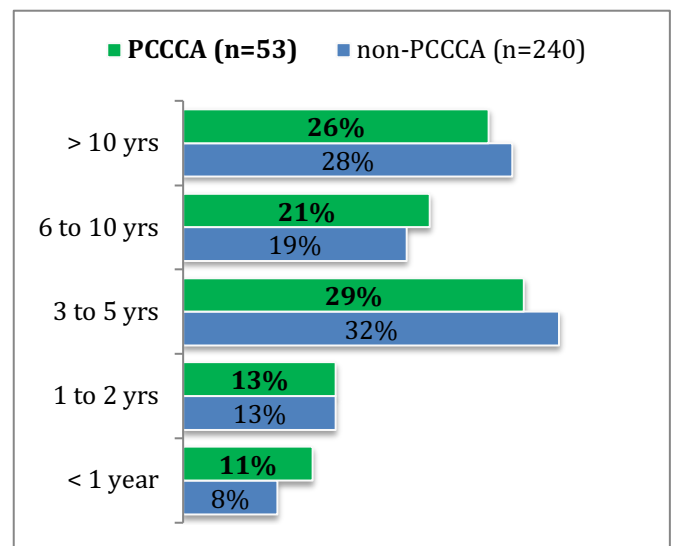


Figure 6: Director Tenure



Part 2: Impacts of COVID-19 Pandemic

The COVID-19 outbreak was officially designated a global pandemic on March 11, 2020. By the middle of the following week, schools across the United States were closed and summer camps were left to determine how to respond, since summer camp registration and staff hiring were well underway. State, provincial, and local health departments forced the closure of many summer camps and retreat centers, while others were left to make choices on their own as to what, if any, programs they would offer

Figure 7: PCCCA Onsite Programming Summary in Summer 2020, n=58

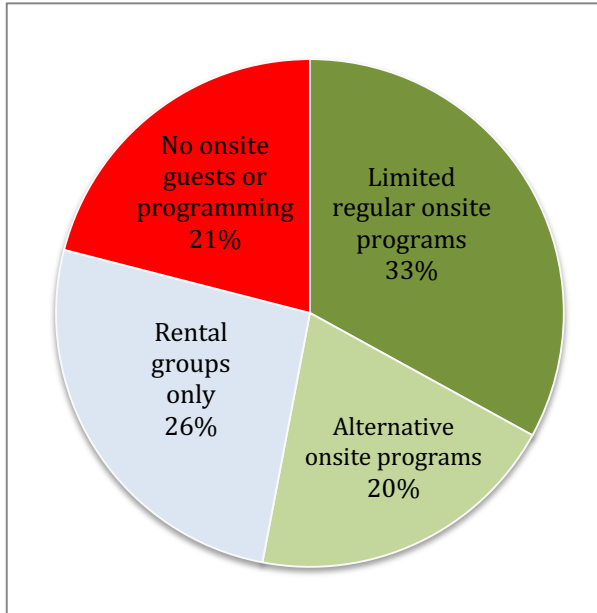


Figure 8: Revenue from Fundraising and Donations, in Comparison with Previous Year, n=54

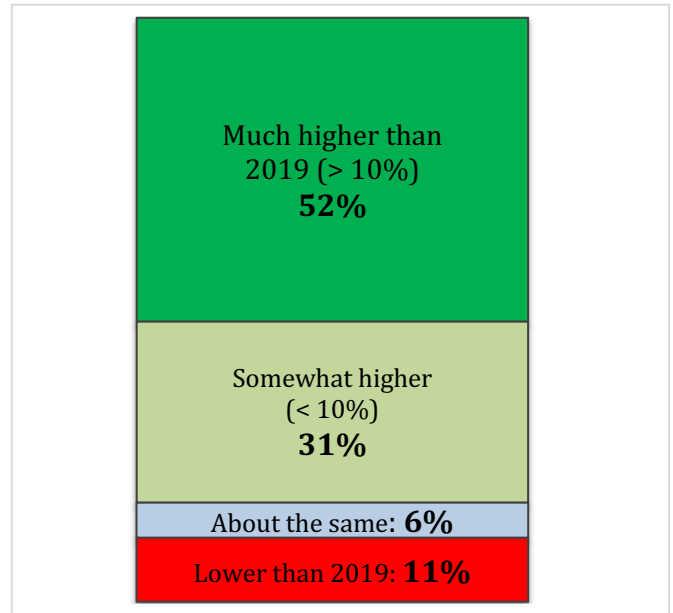


Table 1: Avg. Lost Revenue, by Budget Category

Organization Budget	#	Avg. Lost Revenue
\$200,000 or less	7	\$30,000
\$201k to \$500k	14	\$153,704
\$501k to \$1 million	16	\$327,750
Over \$1 million	11	\$1,267,765

78% of PCCCA respondents indicated having unbudgeted expenses related to COVID-19 mitigation. A third of these were minimal (\$500 or less), with another third \$1,000-\$4,000, and the final third over \$4,000. The average expenditure was \$3,823.

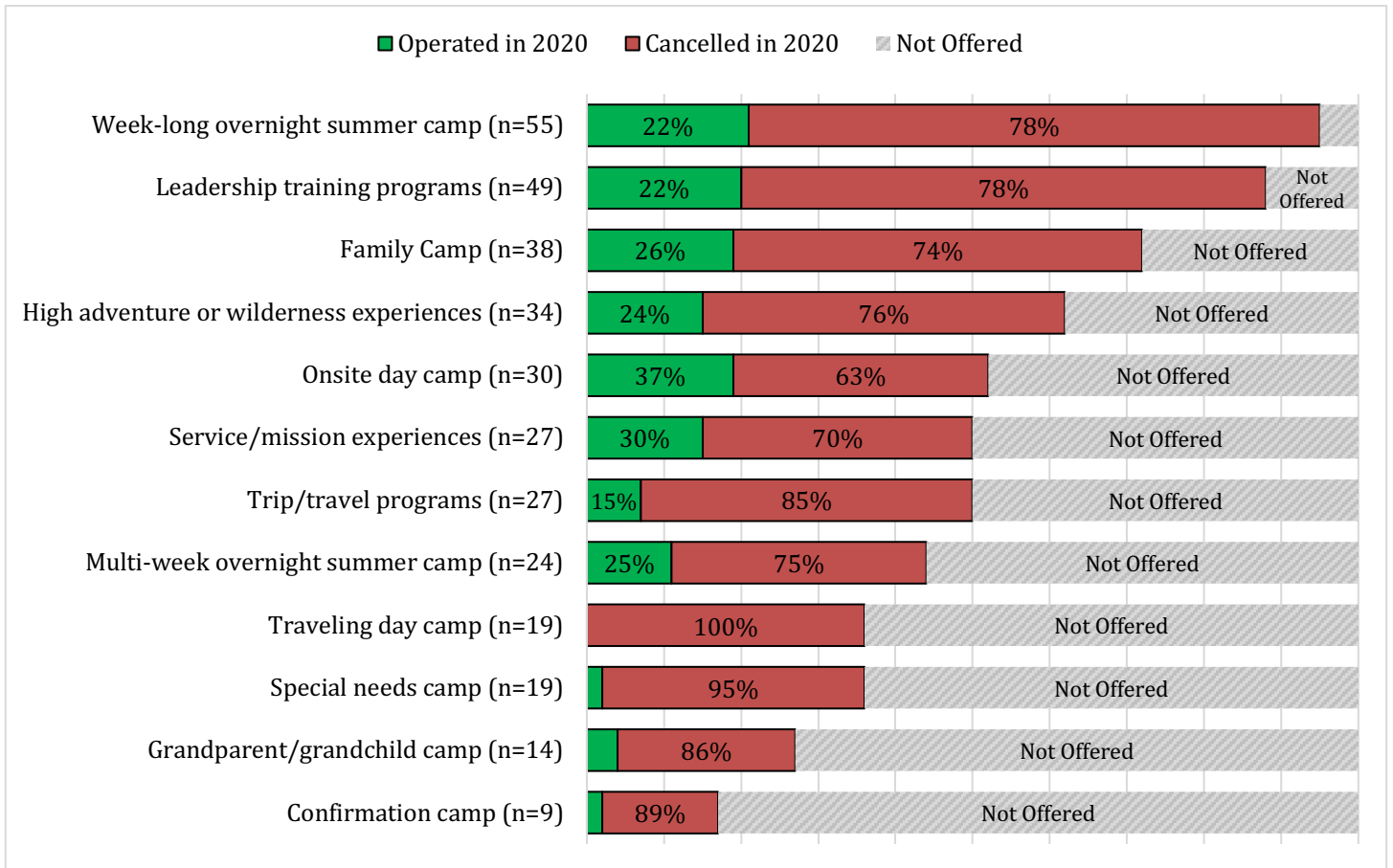
Responding ministry centers reported a combined total of over **\$21.5 million** in lost revenue.

Table 2: Overall Summer Camp Number Change 2019-2020

	# camps	2019 Total	2020 Total	Percent change
Overnight summer campers	47	17,983	2,129	↓ 88%
Day campers	22	4,035	1,738	↓ 57%
Family campers	29	1,755	3,182	↑ 81%*
Summer staff	48	1,315	410	↓ 69%

*The increase in family campers was due to a small group of camps that increased in 2020. 79% decreased or canceled.

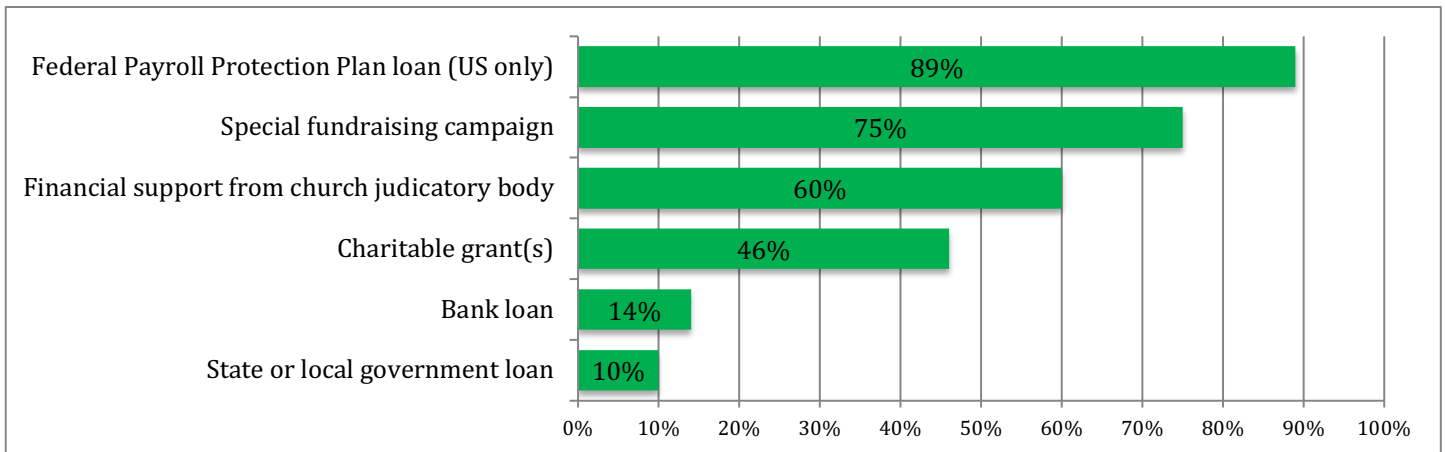
Figure 9: Summer Programs Offered and Cancelled in 2020



Staff Impacts

- 42% of PCCCA organizations had to furlough, lay off, or reduce the salary of full-time staff members. Two-thirds (67%) had to do so to one or more part-time staff members.
- 23% of Executive Directors took a reduction in salary, with the majority of these having their salary reduced by 10% to 25%.
- **Full-time, year-round staff (n=366 at 54 responding organizations):**
 - 13% were furloughed
 - 20% were laid off
 - 20% had their salaries reduced
 - 53% experienced at least one of these
- **Part-time, year-round staff (n=447 at 51 responding organizations):**
 - 29% were furloughed
 - 19% were laid off
 - 7% had their salaries reduced
 - 55% experienced at least one of these

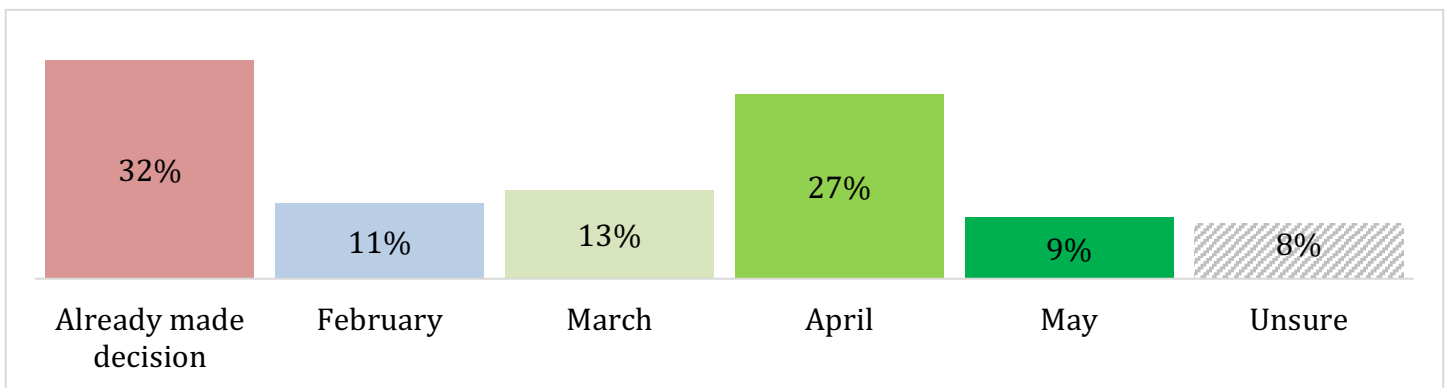
Figure 10: Percent of Ministry Centers Receiving Financial Assistance in Response to COVID-19 Pandemic, n=53



Future Projections

Respondents were asked when they intended to make a final decision for programming in summer 2021.

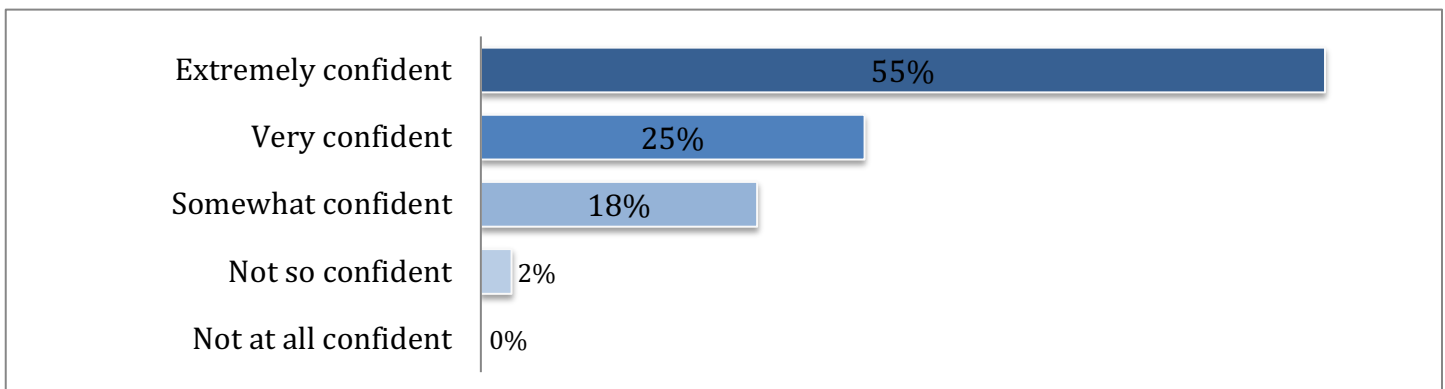
Figure 11: Projected Timing for Final Decision on Summer Camp 2021, n=53



Plan for Summer 2021

11% hoped to open at FULL capacity, **67%** at limited capacity with normal programs, **2%** for alternative programming or user groups only, and 20% still unsure.

Figure 12: Director Confidence that Ministry Center will be Operating in 2 Years, n=55



Part 3: COVID-19 Mitigation Strategies

Figure 13: Prevalence of Camper Screening for COVID-19 in Summer 2020, $n=23$

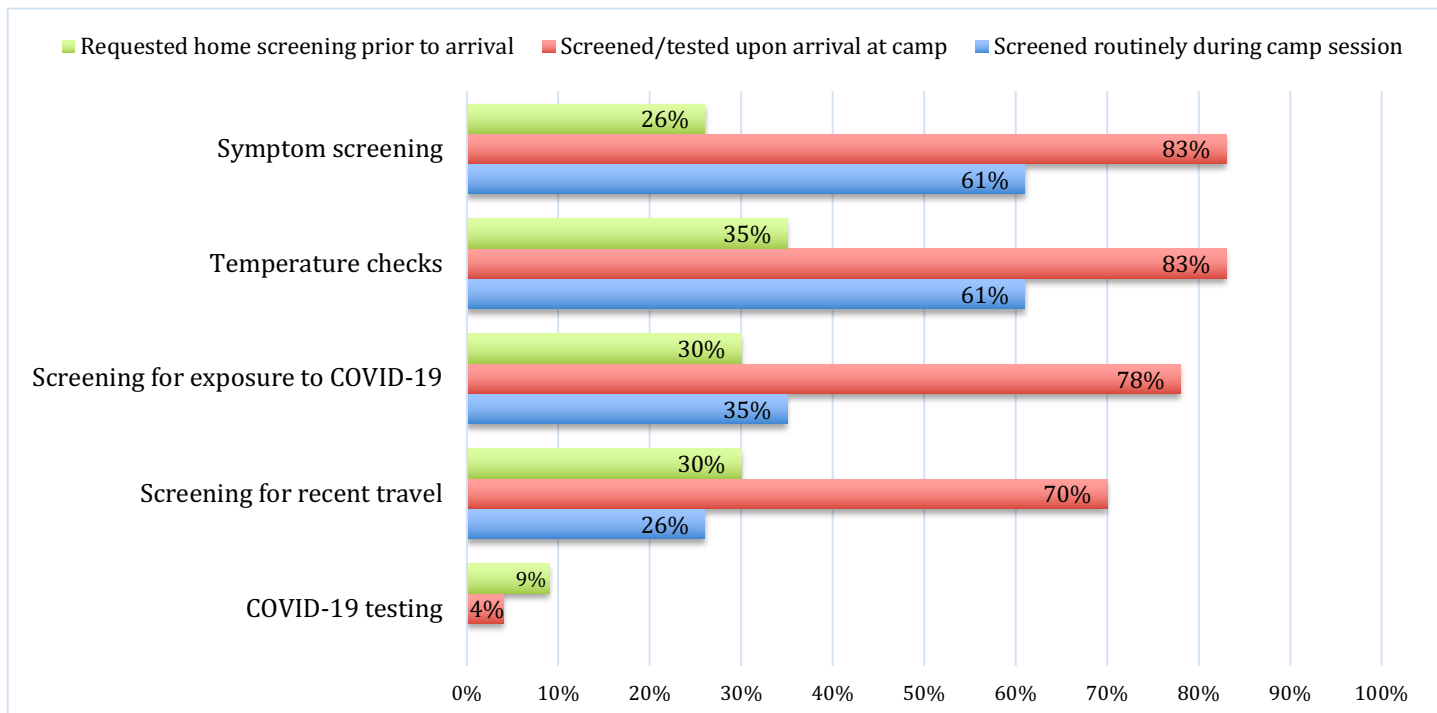
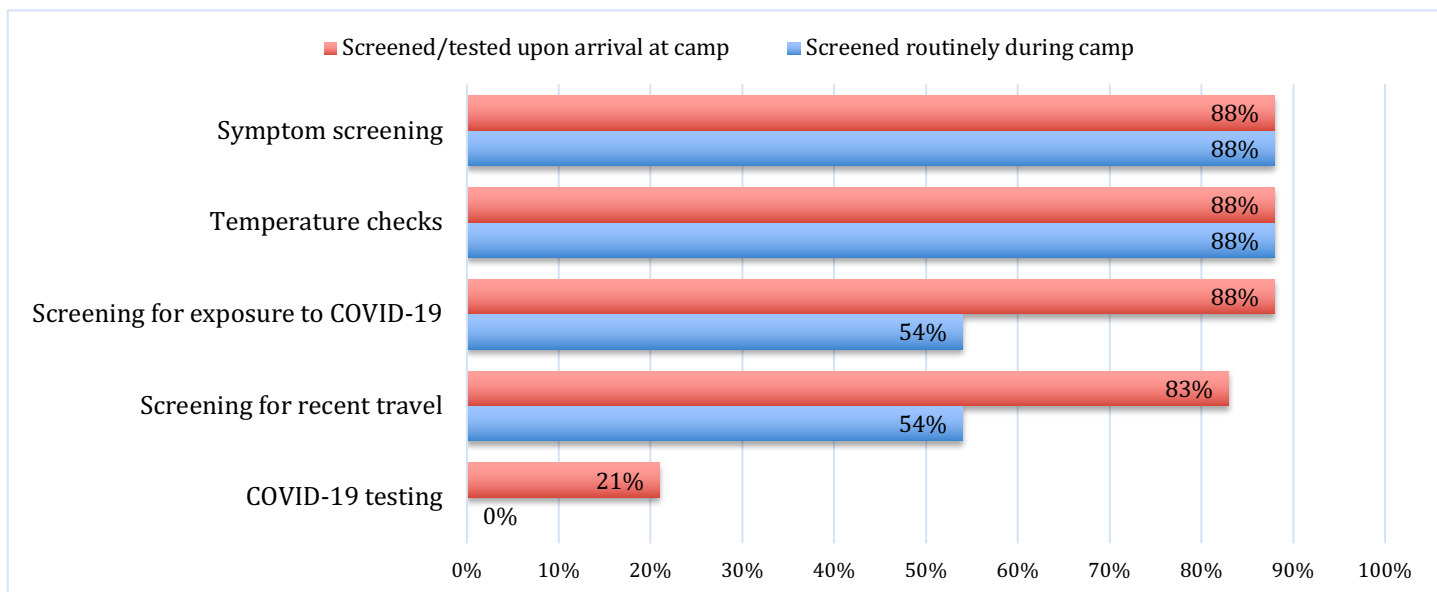


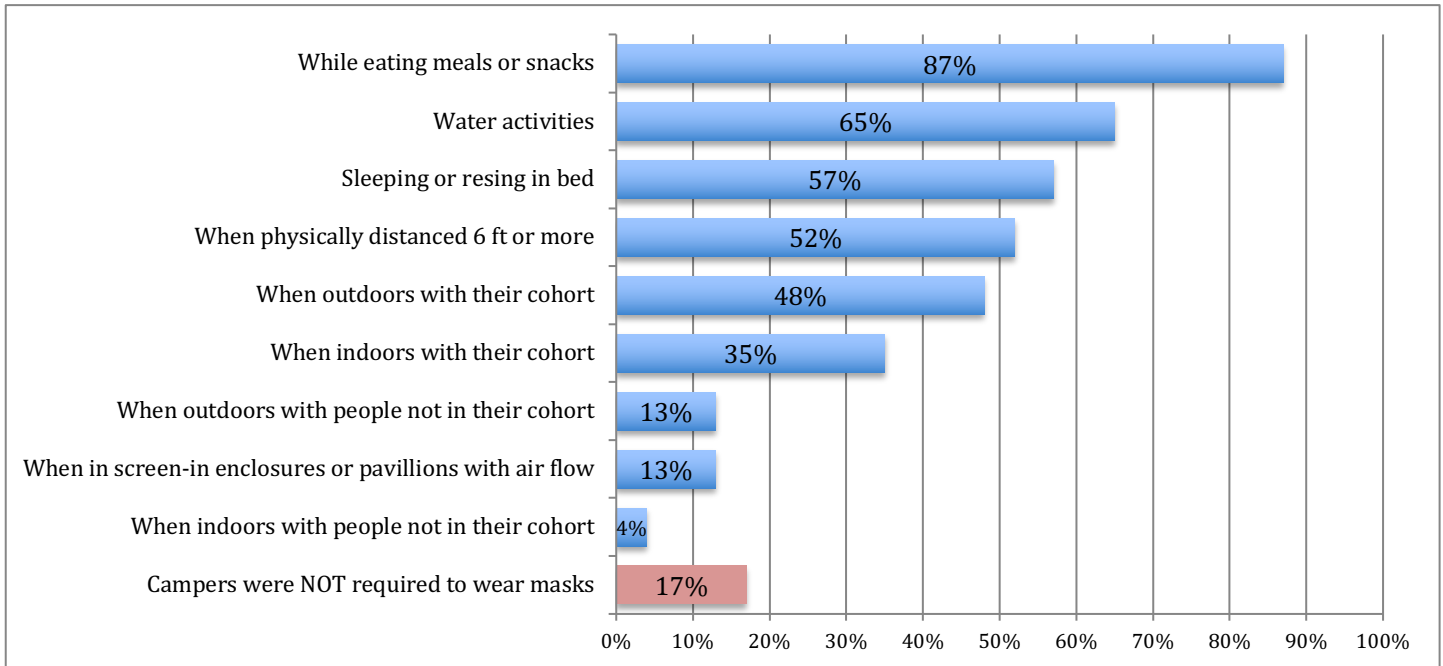
Figure 14: Prevalence of Summer Staff Screening for COVID-19 in Summer 2020, $n=24$



Masks

According to scientific recommendations available in summer 2020, the most effective methods of preventing COVID-19 while in a group setting were to physically distance (6 feet apart or more), be outside as much as possible, and wear a mask. A large majority (83%) of PCCCA camps and retreat centers that offered some form of in-person programming required participants to wear masks. However, mask rules varied based on the different activities. Directors were asked when campers and other guests were allowed to remove their masks.

Figure 15: Percentage of Operating Camps Allowing Campers to Remove Masks During Various Activities, n=23



Confirmed COVID-19 cases (25 ministries with onsite programs)

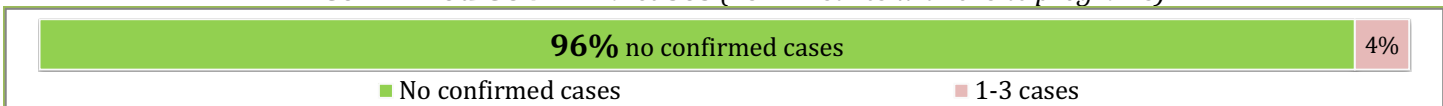


Figure 16: Percentage of Operating Camps with Confirmed Cases of COVID-19, n=27

- Only one of the responding camps had confirmed COVID-19 cases on site, though they reported only a single case.

Part 3: Summer Camp

Overall summer program summary in typical summer (of 81 outdoor ministries):

- 46% had primarily co-ed residential summer camp for children/youth
- 46% ran a combination of traditional summer camp and retreats or other programs
- 4% were primarily rental facilities for outside groups
- 4% ran primarily family camps or adult retreats/conferences

Weeks of Summer Programming:

The number of weeks for summer programming was curtailed sharply in 2020. A third of ministries did not have any weeks of summer programs. Another third had limited weeks of programming (1-6 weeks). The remaining third had the more typical summer lengths of 7 or more weeks of programming.

Figure 17: Centralized v. Decentralized Programming, n=50

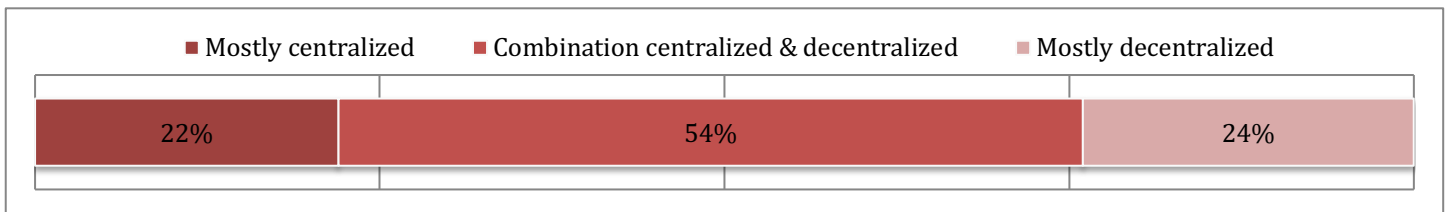
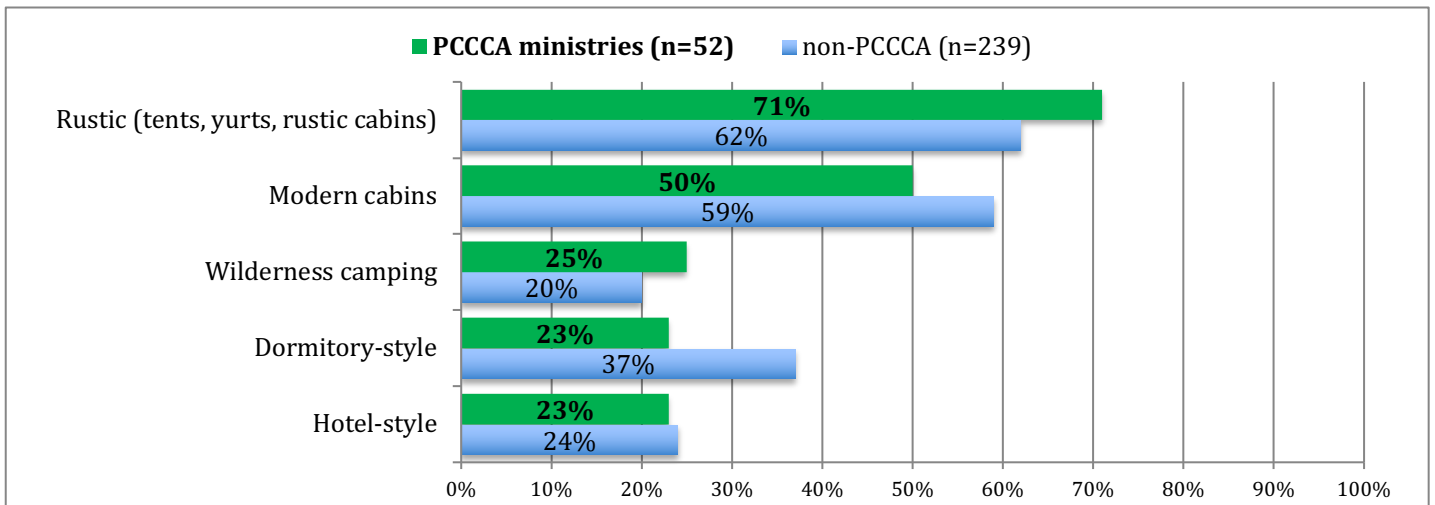


Figure 18: Summer Housing Accommodations Offered



Virtual Camp:

Many camps chose to offer virtual or distance summer camp programs in response to the COVID-19 pandemic. These programs included registered campers and some form of regular programming. About a third of responding PCCCA organizations (36%) indicated that they offered virtual camp programs in 2020. Virtual programs were typically small in terms of participant numbers, with half serving 50 or fewer campers.

Average weekly overnight camp fee: \$429 (roughly equivalent to \$430 in 2018 and \$429 in 2016)

- The range of weekly fees was very large, with half reporting weekly fees between \$375-\$495, with one quarter lower and one quarter higher

Table 1: Average Weekly Camp Fee, by Region

	Northeast	Midwest	South	West	All USA	Canada
PCCCA Camps	\$469	\$426	\$434	\$392	\$428	\$435
Non-PCCCA Camps	\$448	\$431	\$492	\$469	\$460	\$416

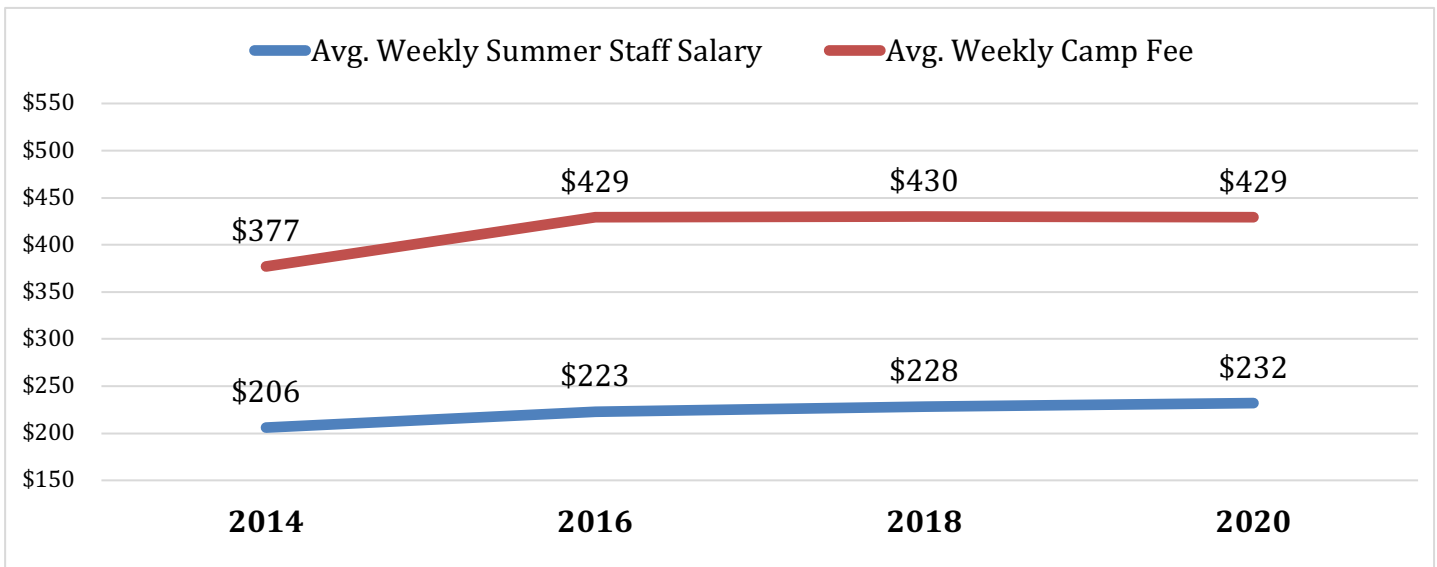
Average weekly summer staff salary: \$232 USD (up from \$228 in 2018)

- The middle two-thirds paid summer staff between \$200-\$250 per week

Table 4: Average Staff Salary, by Region

	Northeast	Midwest	South	West	All USA	Canada
PCCCA Camps	\$230	\$226	\$240	\$228	\$232	\$217
Non-PCCCA camps	\$239	\$262	\$241	\$302	\$259	\$405

Figure 19: PCCCA Summer Staff Weekly Salary and Weekly Camper Fee Trends in United States 2014-2020



Returning Summer Staff (n=46):

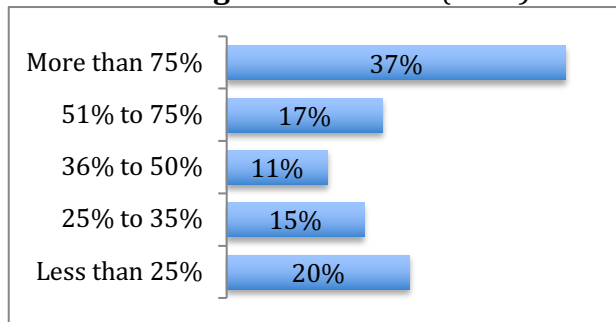


Figure 20: % of Staff Returning from Previous Summers

Camper Diversity (n=24):

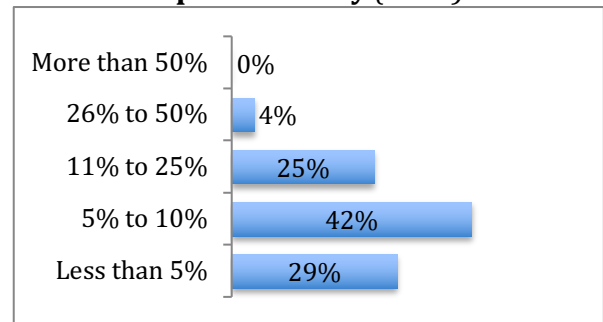


Figure 21: % of Campers representing Racial Minorities

Summer Camp Enrollment and Capacity

Summer Camp Capacity:

A third of PCCCA organizations had a capacity of fewer than 110 campers. Another third had a capacity of 110-160, and the remaining third over 160 campers at once. Average capacity was 141.

Table 3: Summer Camp Enrollment:

	PCCCA 2014	PCCCA 2016	PCCCA 2018	PCCCA 2019**	PCCCA 2020	Other OMC 2020
90% capacity or higher	10%	7%	8%	-	0%	5%
75% to 89% capacity	34%	30%	23%	-	6%	2%
50% to 74% capacity	56%*	23%	34%	-	15%	11%
Less than 50% capacity		40%	35%	-	79%	82%
Enrollment higher than previous summer	42%	58%	41%	-	3%	4%
Enrollment about the same as previous	37%	26%	31%	-	12%	8%
Enrollment lower than previous summer	21%	16%	28%	-	85%	88%
Highest of past 5 summers	-	33%	23%	31%	0%	2%
Higher than most of past 5 summers	-	28%	17%	18%	4%	4%
About the same as past 5 summers	-	26%	27%	39%	6%	5%
Lower than most of past 5 summers	-	12%	29%	4%	13%	5%
Lowest of past 5 summers	-	2%	4%	8%	77%	84%

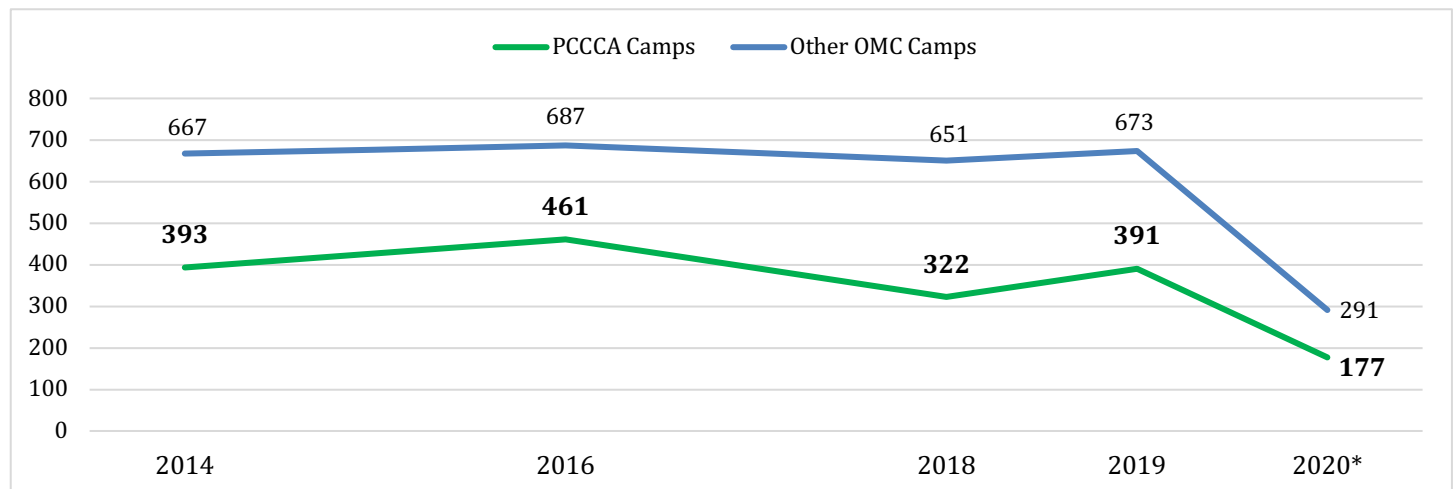
* The 2014 survey did not include the category “less than 50%”; the number represents “less than 75%”

** A single question about 2019 enrollment was included in the 2020 survey

Overnight Camp Attendance:

Summer camp attendance dropped precipitously in 2020. The 47 camping organizations providing numbers reported serving 17,983 overnight campers in 2019 and only 2,129 in 2020, a net decline of 88%. Three-quarters of these camps (75%) did not serve any overnight campers in 2020. The 12 that hosted overnight campers averaged 177, about half of what the same camps averaged in 2019.

Figure 22: Average Number of Overnight Summer Campers, 2014-2020



*2020 numbers represent only those camps that offered overnight camp programs that summer (88% canceled).

Part 4: Retreats and Conferences

Primary clientele for retreats/conferences (n=51):

- 72% Mix of children, youth, adults, and families
- 22% Primarily adults
- 6% Primarily youth/children

Retreat Accommodations Offered:

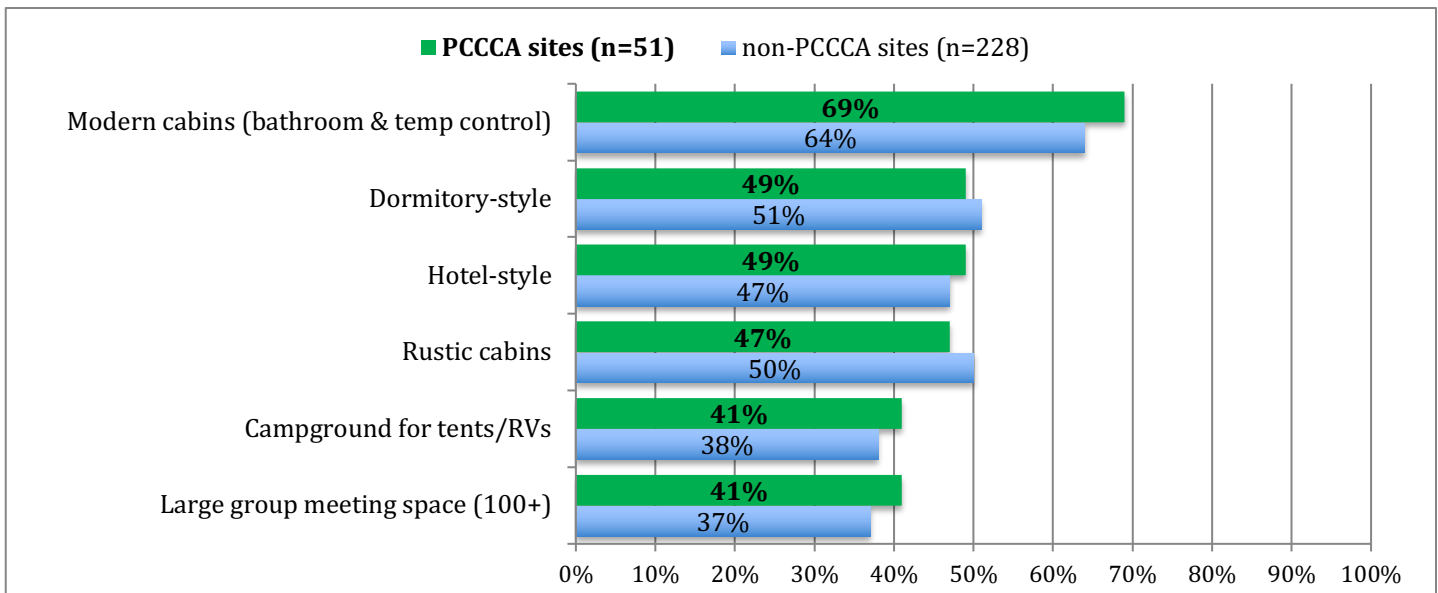


Figure 23: % of Outdoor Ministries Offering Selected Housing Accommodations for Retreat Participants

Seasonal Retreat Staff:

The 50 organizations responding to this question employed a total of 199 seasonal retreat staff in the fall of 2019 and only 55 in the fall of 2020, a decline of 72%. 42% of these organizations did not employ any seasonal retreat staff either year, while this number rose to 82% in 2020.

Retreat Guest Affiliation

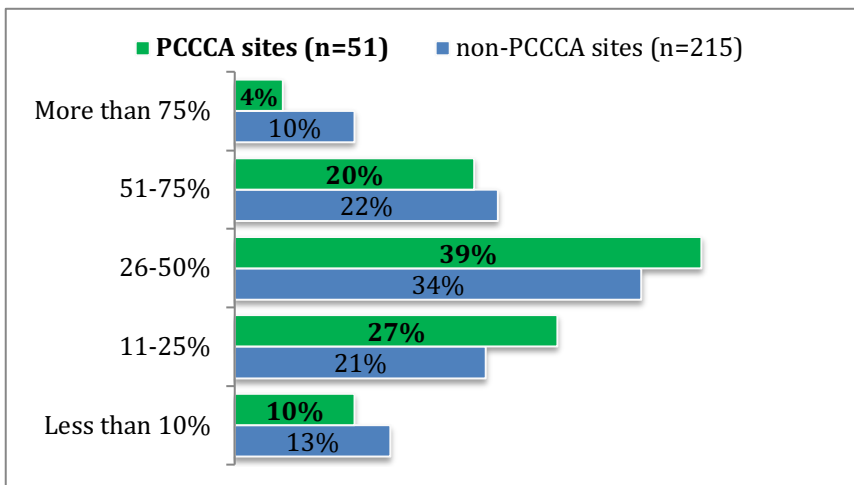


Figure 24: % of Ministries Indicating Retreat Participants Affiliated with Constituent Denomination/Congregations

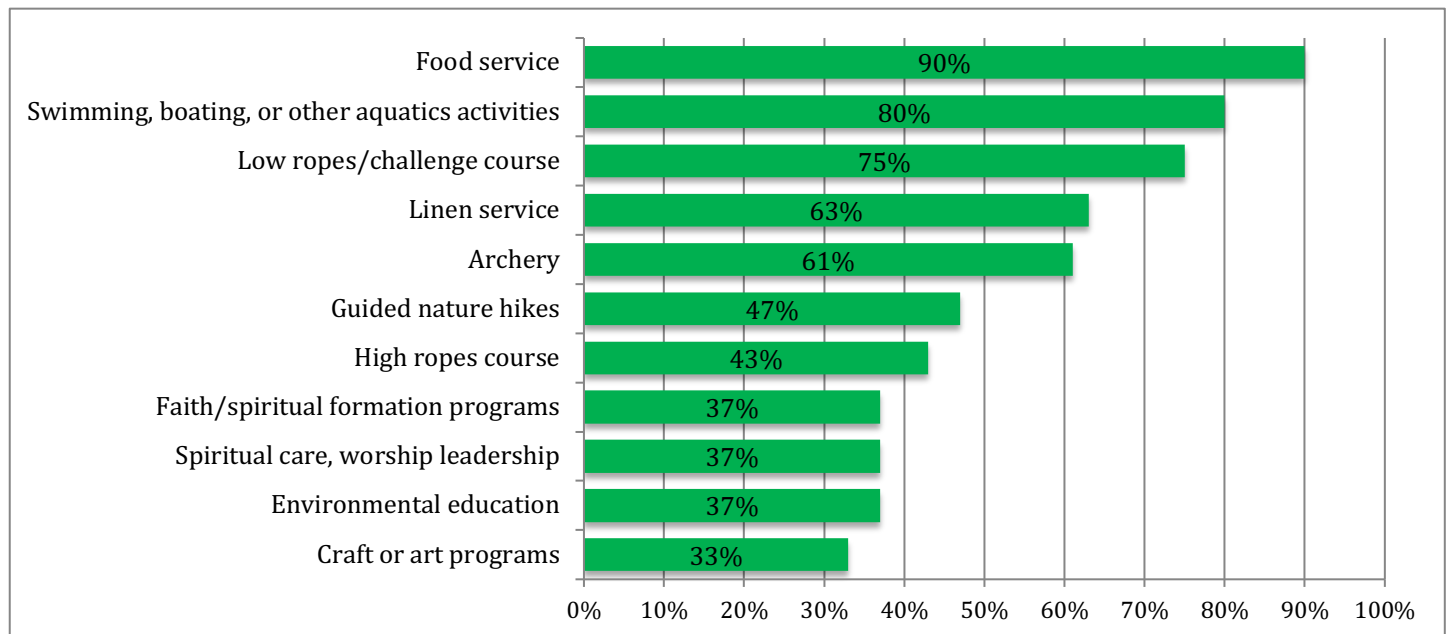
Overnight capacity for retreats/conferences ($n=51$):

A quarter of ministry centers reported that their overnight retreat capacity was 80 or fewer guests. Another quarter had a capacity of 81-140, another quarter 111-199, and the remaining quarter had a capacity of 200 or more guests. Average overnight capacity was 157.

Table 2: Retreat/Conference Usage

	2016 PCCCA Sites $n=41$	2018 PCCCA Sites $n=40$	2020 PCCCA Sites $n=49$	2020 Other OMC Sites $n=227$
90% capacity or higher (<i>weekends</i>)	5%	8%	0%	1%
75% to 89% capacity (<i>weekends</i>)	8%	21%	2%	1%
50% to 74% capacity (<i>weekends</i>)	34%	34%	2%	5%
Less than 50% capacity (<i>weekends</i>)	53%	37%	96%	93%
Usage higher than previous year	44%	48%	2%	2%
Usage about the same as previous	41%	35%	2%	3%
Usage lower than previous year	15%	17%	96%	95%
Highest of past 5 years	22%	20%	2%	2%
Higher than most of past 5 years	25%	31%	2%	3%
About the same as past 5 years	38%	31%	6%	3%
Lower than most of past 5 years	12%	15%	7%	6%
Lowest of past 5 years	3%	3%	83%	86%

Figure 25: Percentage of Ministry Organizations Offering Selected Retreat Programs, $n=51$



Part 5: Camp Philosophy

Level of Agreement with Philosophy Statements about Ministry Site (out of 51 PCCCA respondents)

Right-hand column indicates whether PCCCA directors, on average, agreed significantly more than (↑), less than (↓), or were no different from (≈) non-PCCCA directors. Items are arranged in order of average agreement level.

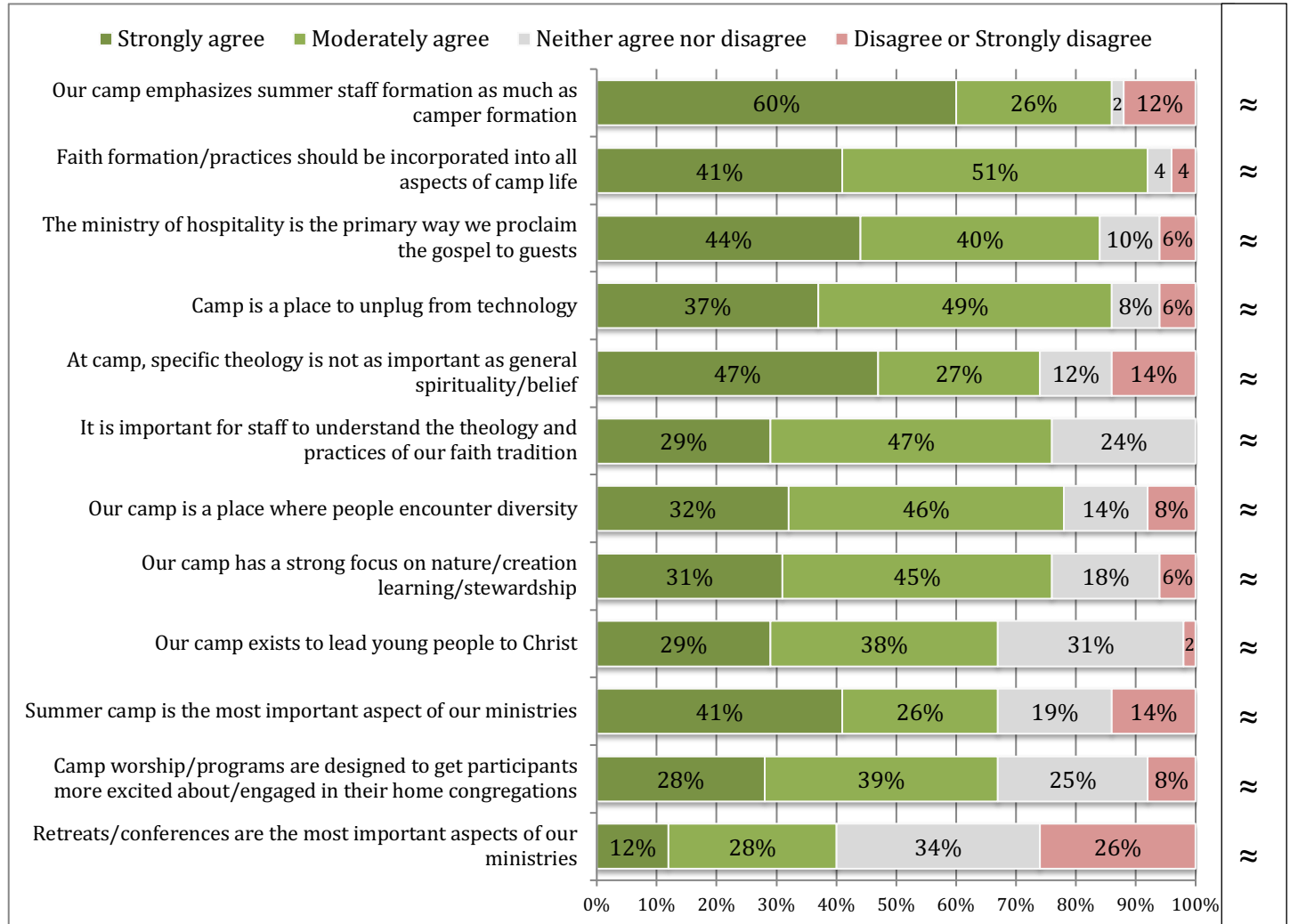


Figure 26: Level of Agreement with Philosophy Statements about Ministry Site

- PCCCA respondents did not vary significantly from the norm among other OMC respondents in any of the above survey items, and their responses were roughly equivalent to previous years of the survey.

Level of Importance Assigned to Selected Program Priorities (of 51 PCCCA respondents)

Symbols at right indicate if PCCCA directors, on average, assigned significantly more (↑), less (↓), or equal (≈) importance to each statement compared with non-PCCCA directors. Items are arranged by average importance.

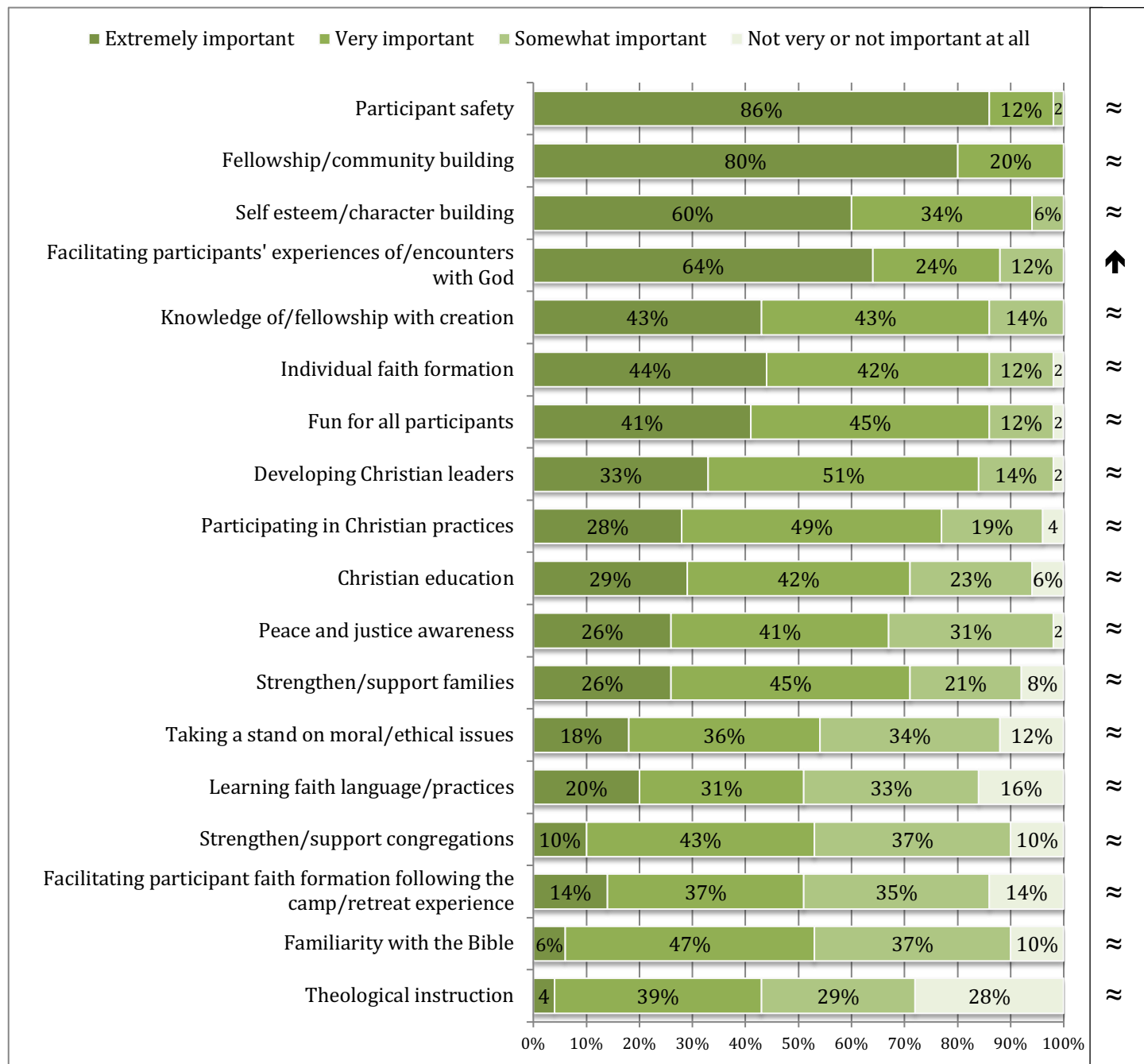


Figure 27: Level of Importance Assigned to Selected Program Priorities

- PCCCA respondents differed significantly from their OMC colleagues on only one item, assigning more avg. importance to “Facilitating participants’ experiences of or encounters with God” (also up from 2018).
- Among PCCCA respondents, average importance has steadily risen in three of the above items since the survey began in 2014: “Knowledge of/fellowship with creation,” “Peace and justice awareness,” and “Taking a stand on moral/ethical issues.”