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2022



OMC

DIRECTOR

SURVEY

Lutheran Outdoor Ministries Report Supplement



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Introduction

This report is designed as a supplement to the 2022 OMC Director Report, which summarizes data from 277 respondents representing 328 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 an 80% completion rate and a 50% response rate.

This report supplement presents data specific to ministry centers affiliated with Lutheran Outdoor Ministries (LOM). These data are at times compared with the other OMC ministries that responded and other times compared with past data from LOM 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.

In This Report

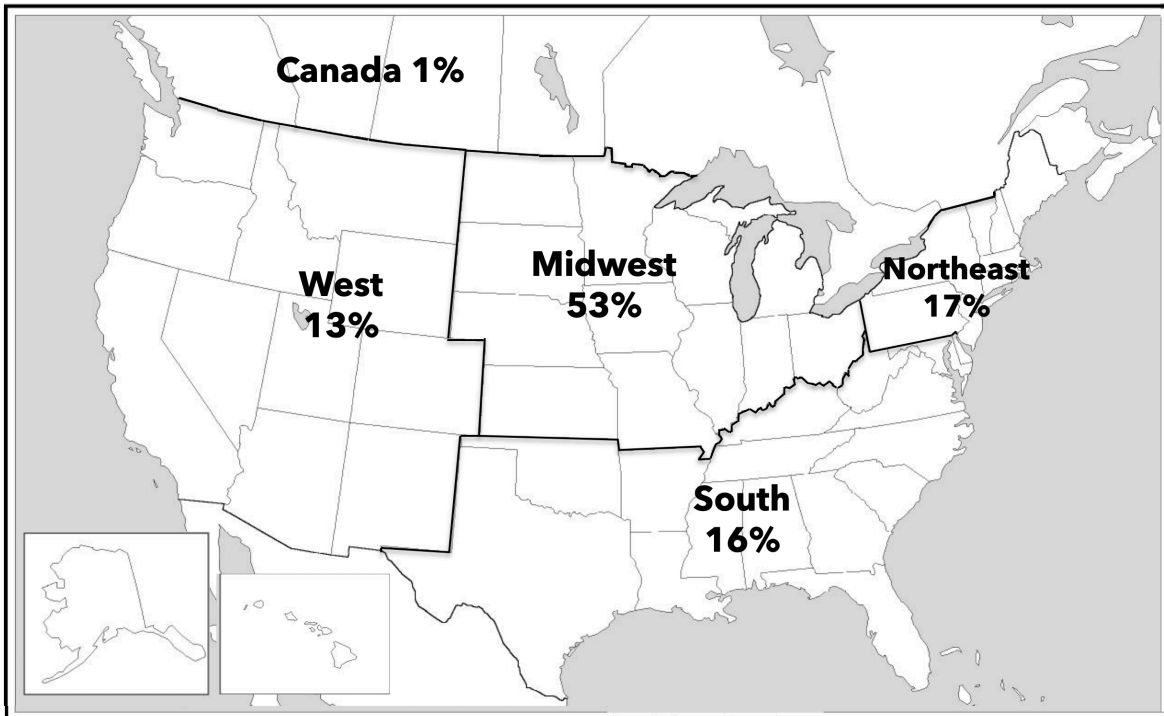
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Ministry Site Overview

64 Lutheran Outdoor Ministries (LOM) organizations responded to the survey, representing 79 ministry sites.

FIGURE 3A: PERCENTAGE OF RESPONDING MINISTRIES, BY REGION, n=64



*Organization distribution was roughly equivalent to previous years of the survey

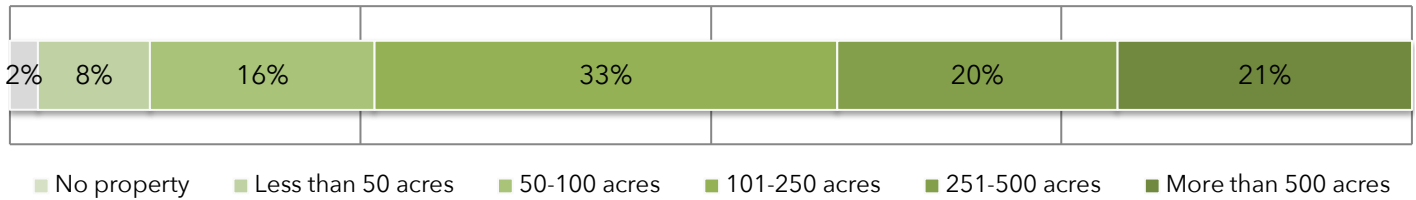
General Ministry Site Overview

- 83% of respondents were at a single-site ministry, while the other 17% had an organization representing multiple sites (about a 2/3 of these had 2 sites and the remaining third had 3 sites)
- 88% of respondents indicated their ministry center is open year-round
- 86% Mixed-Use Sites: offered summer camp programming alongside other programming, such as retreats, conferences, and user groups
- 11% Primarily Summer Camps: limited or no other programs
- 3% indicated that they did not offer summer camp programs



Property

FIGURE 4: PROPERTY SIZE IN ACRES, n=63



- 75% had more than 100 acres of property, and a quarter had 450 acres or more
- The average individual site was 324 acres

Full-time Employment

- 5% had no full-time staff members
- 6% employed 1 full-time staff member
- 22% employed 2-3
- 20% employed 4-5
- 34% employed 6-10
- 13% employed 11 or more

Employment Summary *(including full-time and part-time staff)*

- A quarter of LOM sites had 6 or fewer paid staff people (only 5% operated with one paid staff or none at all)
- Half had between 7 and 13 paid staff members
- The remaining quarter had 14 or more paid staff members (including 10% with 20 or more staff)

Vacancies

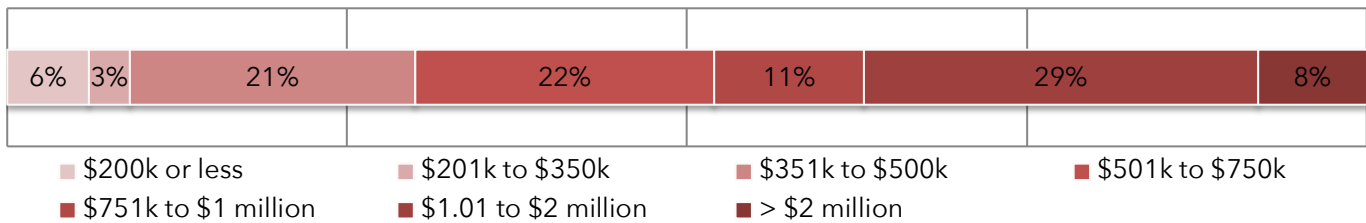
- Of the ministry centers reporting that they employed year-round staff people, half (48%) indicated that they currently had one or more staff vacancies, including 10% that had 3 or more vacancies.

Accreditation

- 63% of LOM ministry centers were accredited through the American Camp Association (ACA)
- 14% were members of the Christian Camp and Conference Association (CCCA)

Annual Operating Budget in 2022

FIGURE 5A · n=63



Variation in LOM budget was similar to previous years

Fundraising & Donations Revenue in Comparison with Previous Year

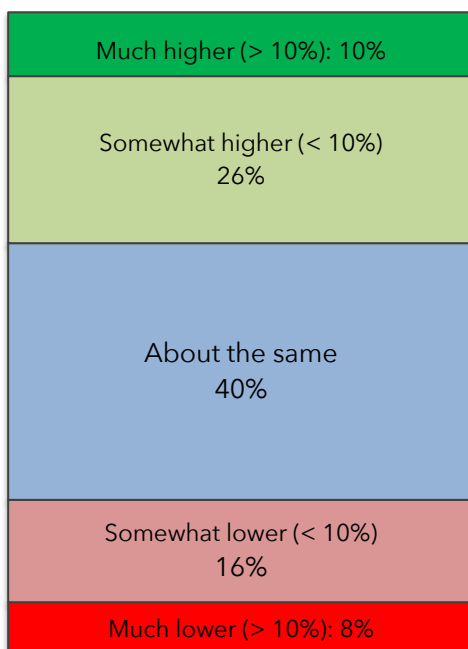


FIGURE 5B · n=62

Fundraising among LOM organizations was generally higher in 2022 compared with the previous fiscal year. This followed the general trend among other OMC organizations. However, there was a large discrepancy in LOM based on annual budget (see 5C). Higher budget camps tended to see increases in fundraising revenue, while smaller camps saw less consistent increases.

FIGURE 5C: % REPORTING INCREASED FUNDRAISING REVENUE, BY ANNUAL BUDGET CATEGORY

	LOM > 2021	Other OMC > 2021
Budget: under \$200,000	25%	48%
Budget: \$200k to \$500k	20%	34%
Budget: \$501k to \$1 million	30%	31%
Budget: over \$1 million	52%	32%
All Ministry Centers	36%	35%

Director Confidence That Ministry Center will be Operating in 2 years

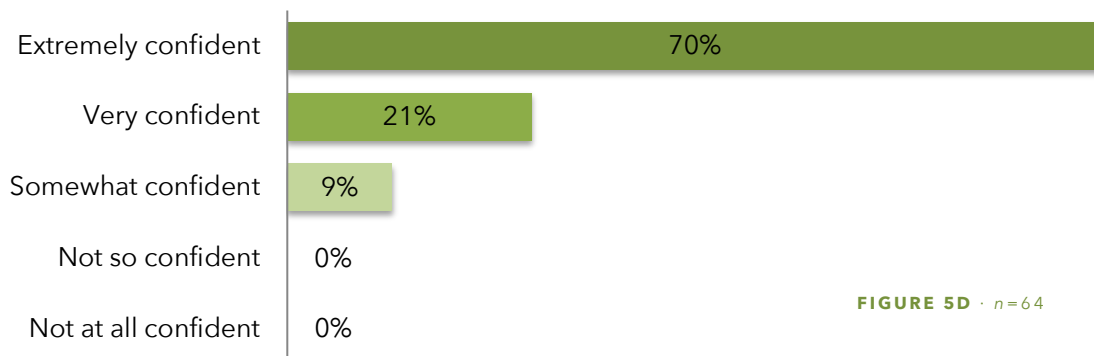


FIGURE 5D · n=64



Congregational Connection

Director Impressions of Center's Emphasis on Faith and Christian Teachings

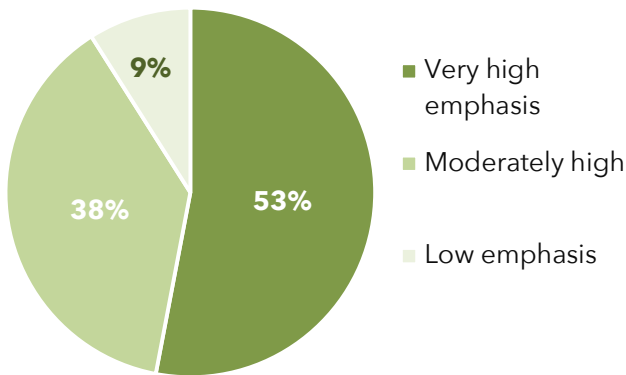


FIGURE 6A

Director Impressions of Connection to Congregational Ministries & Faith Tradition

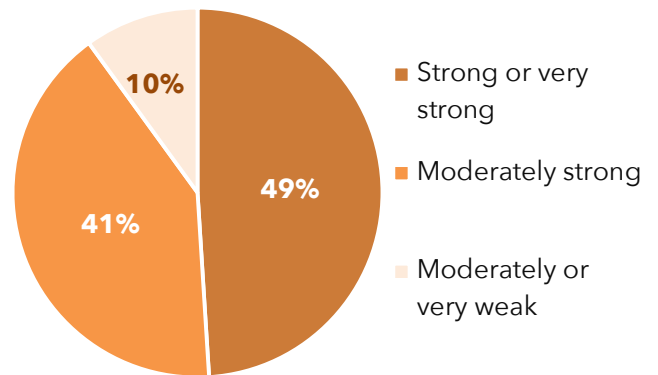
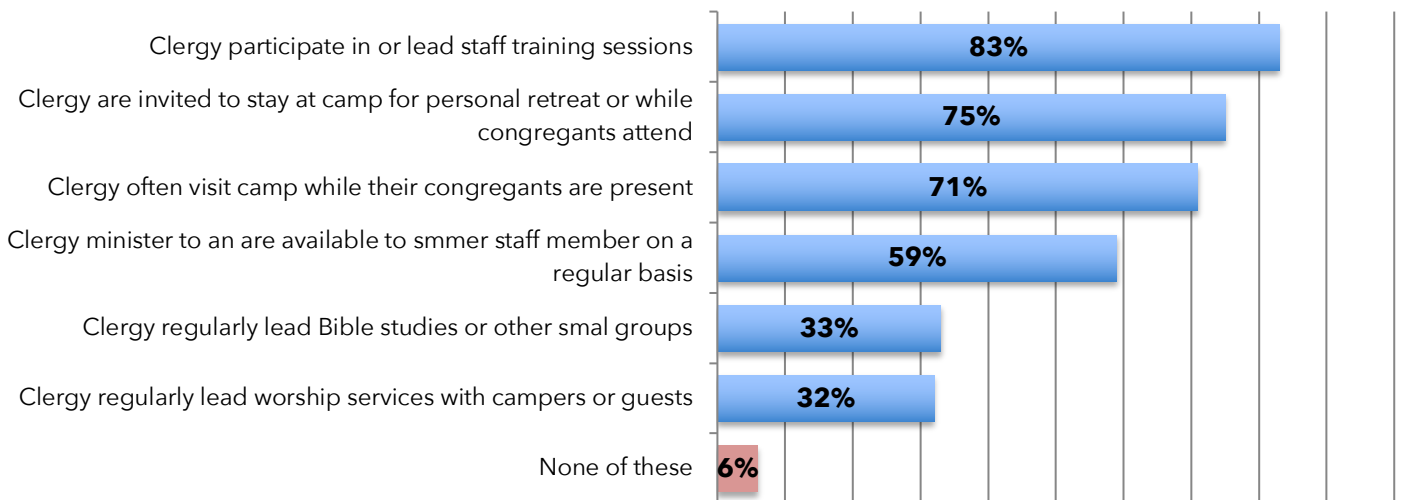


FIGURE 6B

Ways Clergy are Involved During the Summer Months

FIGURE 6C, n=63



Combining the above items with frequency of clergy involvement, in general, suggests that 11% of ministries had very low levels of clergy involvement, 33% moderately low involvement, and 56% high or very high involvement.

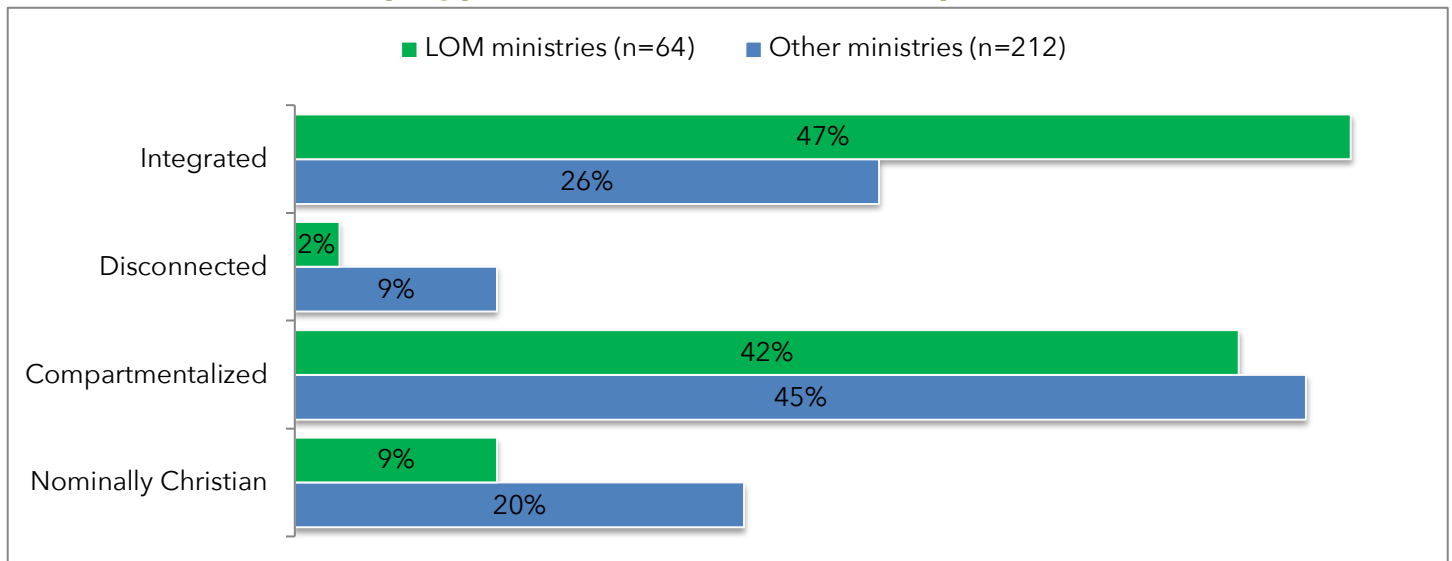


Outdoor Ministry Type

Based on responses to multiple survey questions, ministry sites were categorized by their connection to congregational ministries/denominational teachings (weak connection, moderately weak, moderately strong, and strong connection) and the emphasis placed on faith/Christian practices (low, moderately high, very high). Combining these two categories reveals four general types of mainline Protestant outdoor ministries:

1. **Nominally Christian:** Low faith emphasis, weak connection to congregations/denominational ministries
2. **Compartmentalized:** Moderate faith emphasis, moderate connection
3. **Disconnected:** High faith emphasis, weak connection to congregations/denominations
4. **Integrated:** High faith emphasis, strong connection to congregations/denominations

FIGURE 7: Camp Type, LOM Ministries in Comparison to Other OMC



The prevalence of integrated ministries fell to the lowest level among LOM ministries since the survey began. Meanwhile, the prevalence of compartmentalized ministries has doubled (from 20% in 2018 and 25% in 2020). Nominal ministries have also doubled in LOM, from just 2% of respondents in 2018 and 5% in 2020. This follows a trend of lower emphasis on faith formation and faith teachings.

In 2022, a robust 83% of LOM respondents agreed with the statement, "Faith formation/practices should be incorporated into all aspects of camp life." However, this has been trending downward, from 86% in 2020 and 95% in 2018.



LOM THREAT ASSESSMENT

The following were identified as the greatest threats facing Lutheran Outdoor Ministries camps by directors in the 2022 OMC Directors Survey. This data set consists of **64 responses**.



THREAT #1 Staffing

The most commonly identified challenges by LOM camp directors were related to staffing. Their areas of concern included finding, recruiting, and hiring summer staff members as well as other seasonal staff. Some expressed that inadequate staff numbers, staff retention, and staff quality were specific challenges.

Identified as a Top Threat
46 of 64 // 72%

Identified as the #1 Threat
28 of 59 // 43%



THREAT #2 Increasing Costs

Rising costs and inflation were another common threat identified by directors. Some specifics included costs of food, supplies, and staffing. It is worth noting that general finances and fundraising were broken out from cost specifics and also in the top ten threat categories.

Identified as a Top Threat
27 of 64 // 42%

Identified as the #1 Threat
6 of 64 // 9%



THREAT #3 Church Engagement

LOM directors identified challenges related to church engagement. They referenced things like declining congregation membership, dwindling youth ministries, and shifts in the landscape of church as a whole. While more identified costs as a top threat, a higher number (11) saw this as the number one threat, suggesting at least the perception of its impact may be greater.

Identified as a Top Threat
22 of 64 // 34%

Identified as the #1 Threat
11 of 64 // 17%

TOP Ten

While the areas above represent the top 3 threats identified, the following round out the top ten threat categories along with the number of directors identifying each.

1. Staffing	46	6. Camper Numbers	9
2. Increasing Costs	27	7. Fundraising	8
3. Church Engagement	22	8. Competition	7
4. Culture/Society	15	9. Finances	6
5. Infrastructure/Site	12	10. Covid-19	5



Camp/Retreat Center Directors

About the Directors

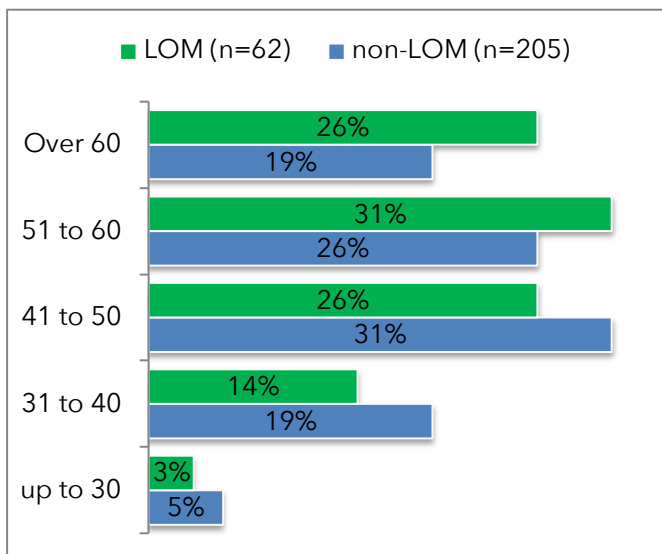
- 100% were white
- 33% were female
 - Among other OMC ministries, 41% of directors were female
 - The proportion of LOM directors that were female has risen slowly but steadily since 2014

Education

- Education level: 3% did not have a bachelor's degree, 51% had a bachelor's degree, 46% had a master's degree or higher
- 36% had a formal theological degree (including 15% with an M.Div) and an additional 10% had a professional certification in religion, theology, or ministry
- 25% had received no formal theological education
- The remaining 39% had taken some courses or continuing education focused on religion or theology

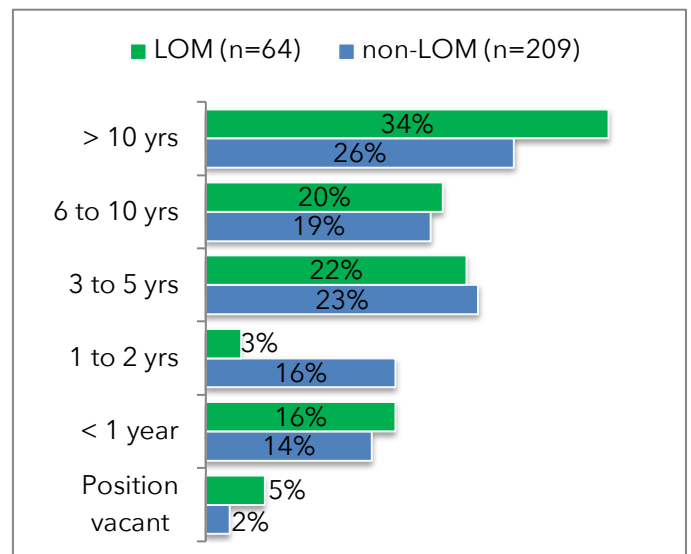
Director Age

FIGURE 9A



Director Tenure

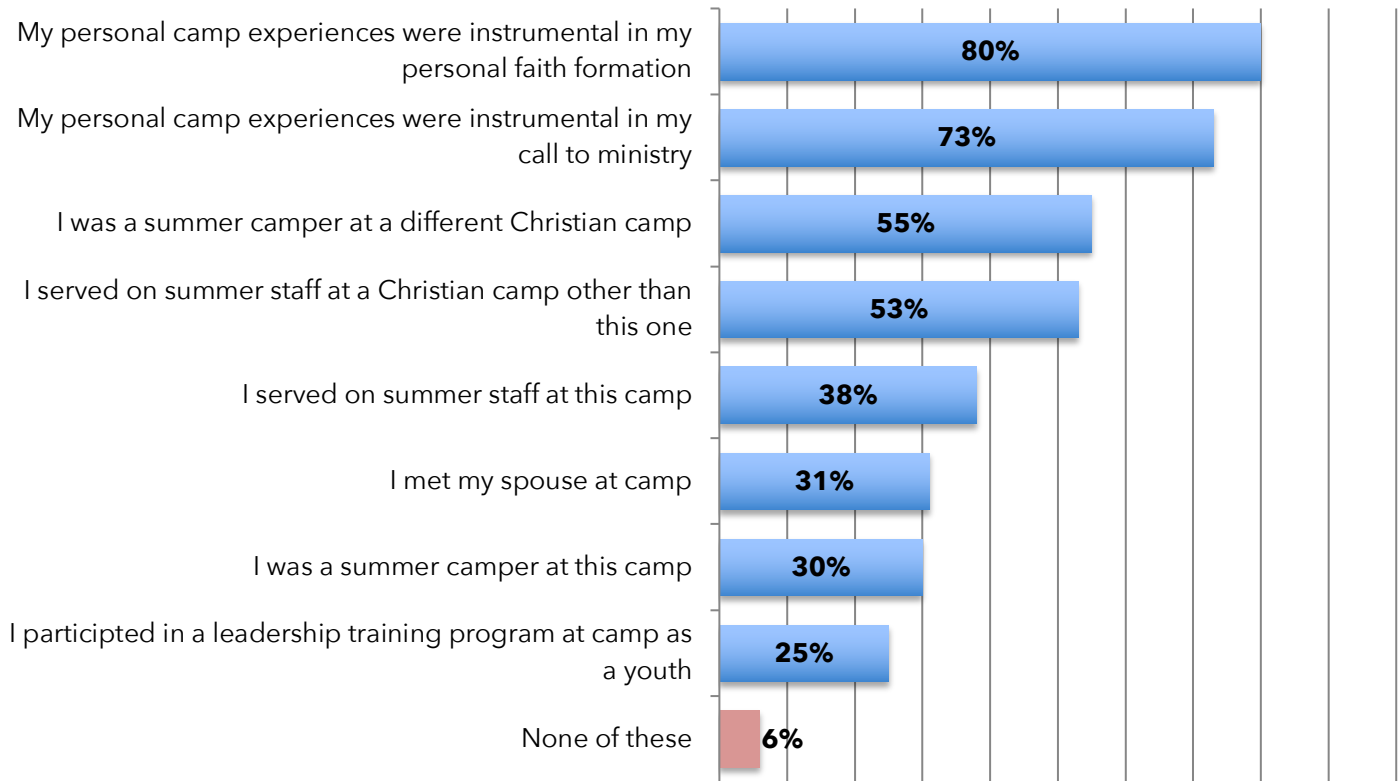
FIGURE 9B





In which of the following ways has camp impacted your personal story?

FIGURE 10A, n=64



- **84%** of respondents served on summer camp staff at either their current camp or another Christian camp
- **78%** attended summer camp, either at their current camp or another Christian camp
- Nearly two-thirds of respondents (**64%**) indicated 4 or more of the above ways camp impacted them

Respondent State of Being

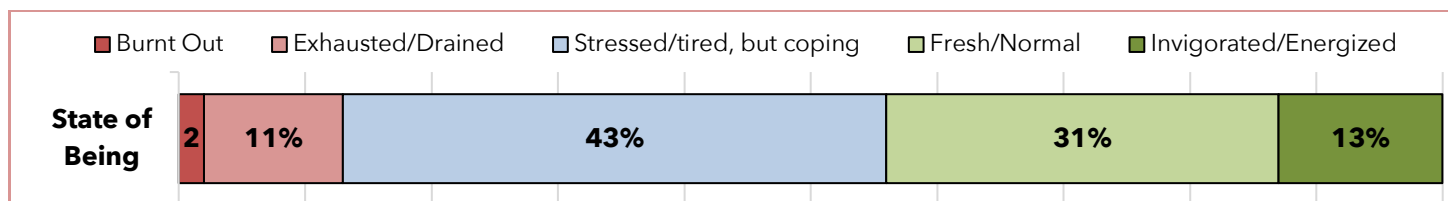


FIGURE 10B



Summer Camp 2022

Overall summer program summary

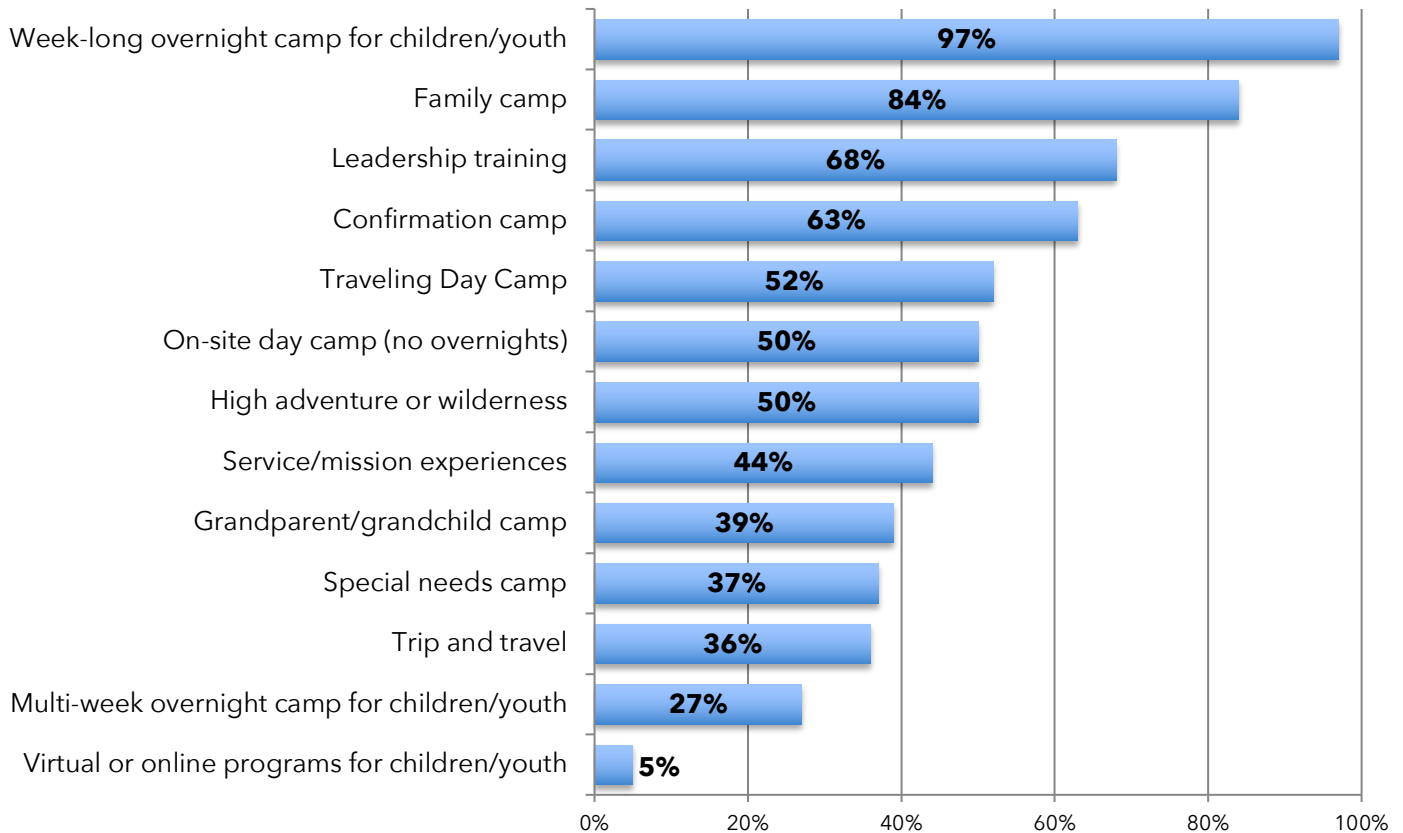
- 68% had primarily co-ed residential summer camp for children/youth
- 29% ran a combination of traditional summer camp and retreats or other programs
- 3% were primarily rental facilities for outside groups

Weeks of Summer Programming

The median number of weeks of summer camp programming offered in 2022 (not including staff training) was 8, with 83% of camps offering between 6 and 9 weeks of programming. The remaining 17% were split evenly between those offering fewer than 6 weeks and those offering 10 or more weeks of programming.

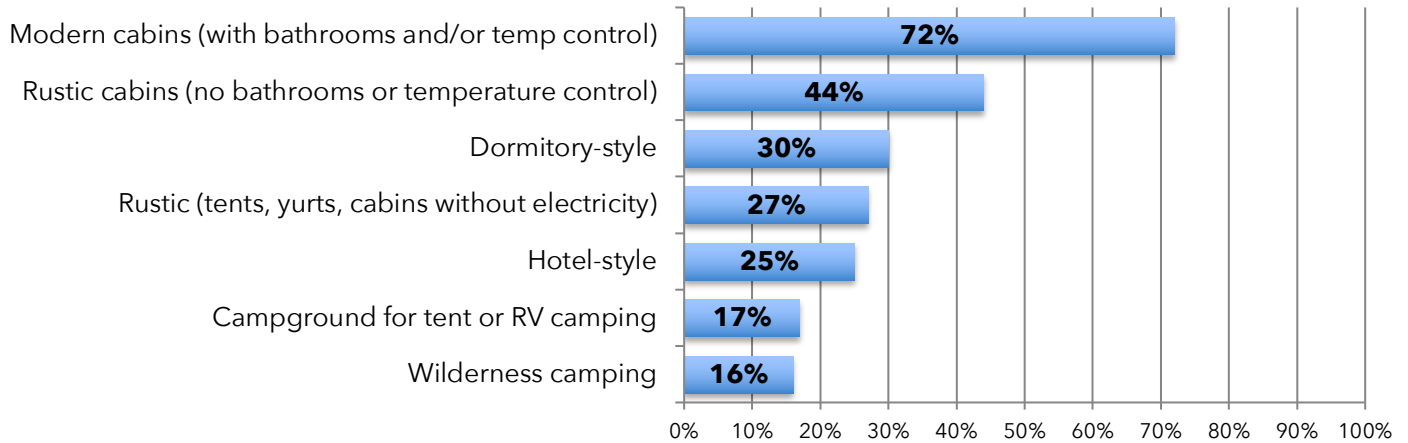
Summer Ministry Sessions Offered (of 62 centers offering summer camp programs)

FIGURE 11, n=62



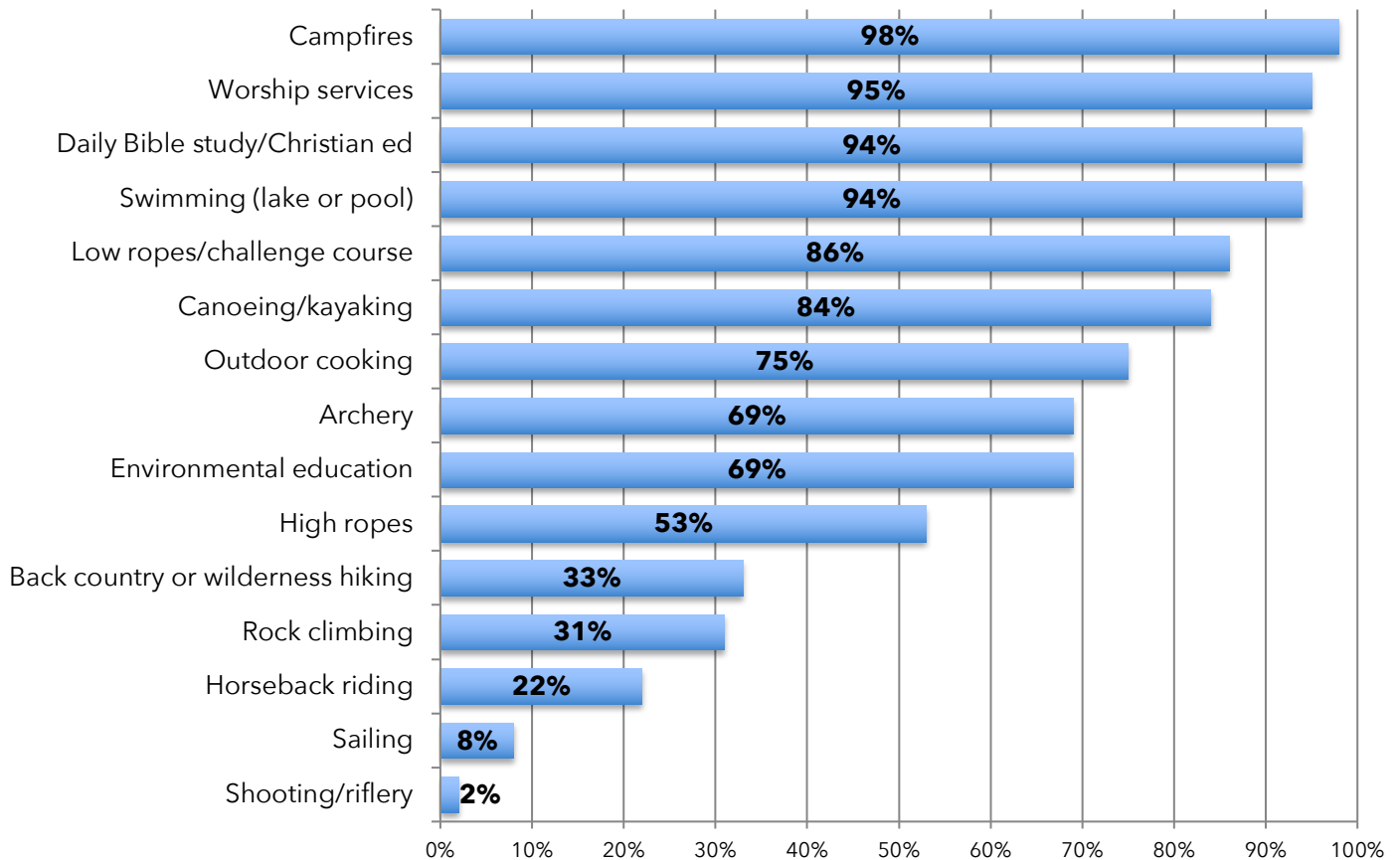
Summer Housing Accommodations Available

FIGURE 12A, n=64



Which of the following are regularly offered during summer programming?

FIGURE 12B, n=64



Bible Study Curriculum:

59% used the LOM curriculum, 3% used InsideOut, 35% wrote their own, and 3% did not have a set curriculum

Centralized and Decentralized Programming

Centralized programming was defined as having “daily large-group activities, individual participant choice, and large-group meals,” while decentralized programming was defined as having “activities by participant group, few all-camp activities, and meals in small groups.” As in years past, OMC camps tended to be more centralized than decentralized.

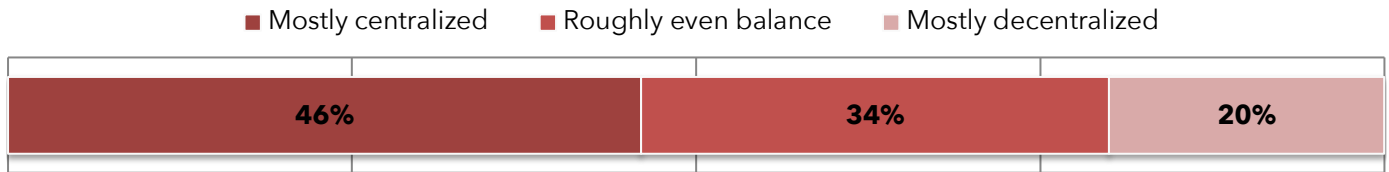
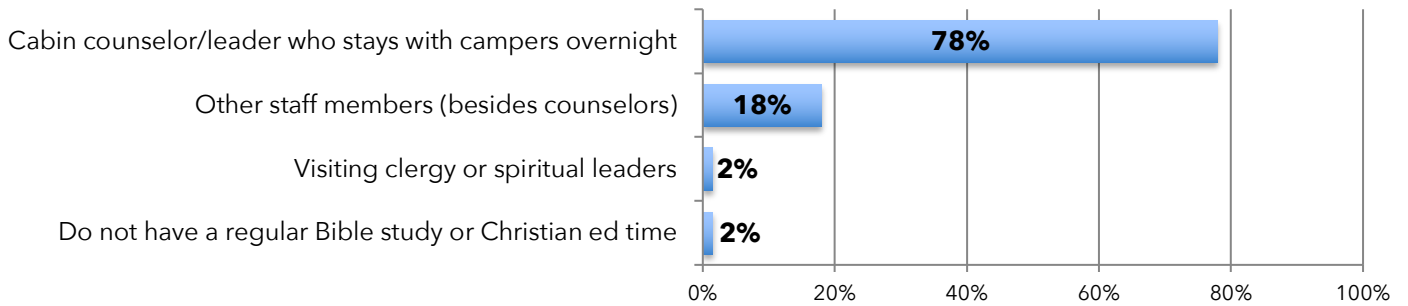


FIGURE 13A, n=59

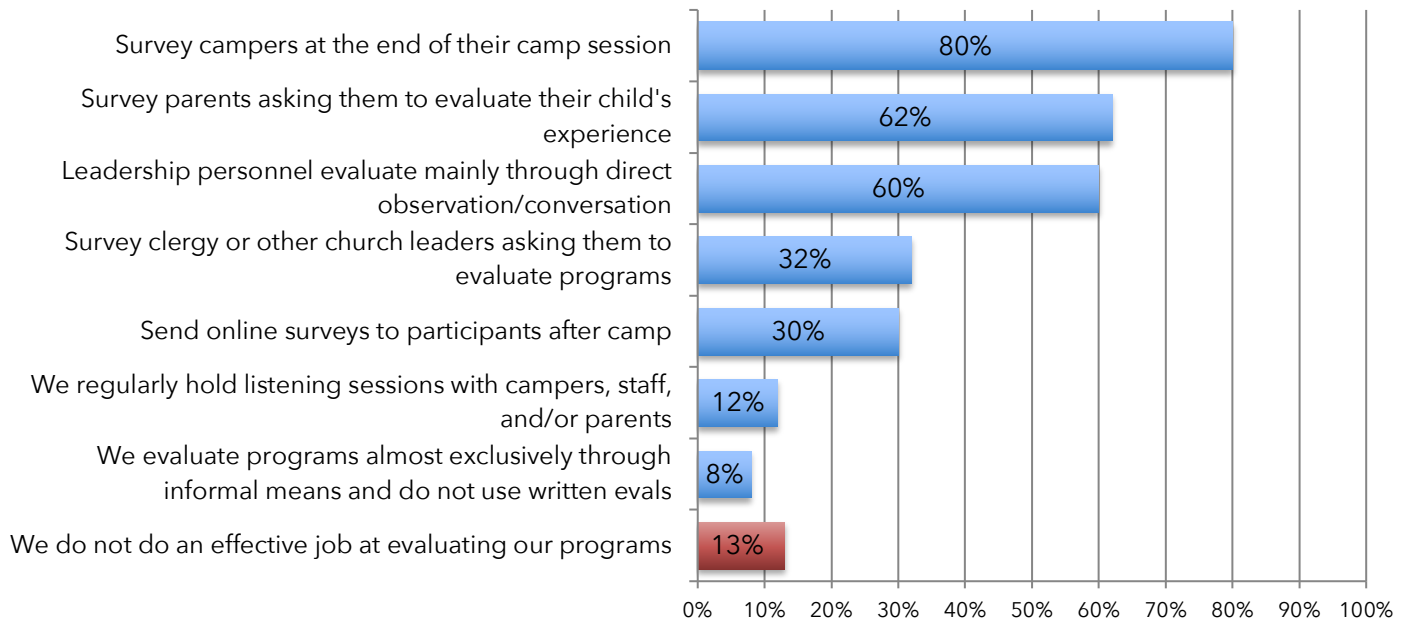
Bible study/Christian ed leader for majority of programs

FIGURE 13B, n=59



Evaluation Methods Used in 2022

FIGURE 13C, n=60





Summer Camp Enrollment in 2022

Summer Capacity

Summer camp capacity varied among responding ministry centers. A third of respondents had capacity for fewer than 120 overnight guests at a time. Another third had capacity for 120-170 overnight guests. The top third had capacity more than 170 overnight guests at a time. Average capacity was 164.

- Only 39% of LOM camps indicated their enrollment was at least 75% of capacity in 2022 (including 18% saying enrollment was at 90% capacity or higher).
- Just over half (59%) indicated that enrollment was higher than in 2021.
- For half of camps (50%), enrollment was still down when considering the past 5 years.

Summer Camp Enrollment Trends among LOM Sites

FIGURE 14

	2014	2016	2018	2020	2022
90% capacity or higher	14%	16%	8%	5%	18%
75% to 89% capacity	42%	33%	31%	2%	21%
50% to 74% capacity	44%	44%	45%	7%	49%
Less than 50% capacity		7%	16%	86%	12%
Higher than previous summer	41%	49%	26%	5%	59%*
About the same as last summer	28%	40%	38%	5%	24%
Lower than previous summer	32%	11%	36%	90%	17%
Highest of past 5 summers	-	22%	13%	1%	5%
Higher than most of past 5 summers	-	22%	24%	2%	15%
About the same as past 5 summers	-	34%	32%	5%	30%
Lower than most of past 5 summers	-	20%	23%	6%	38%
Lowest of past 5 summers	-	3%	8%	86%	12%

* 34% indicated the increase was "much higher" than the previous summer (greater than 10%), and an additional 25% said "somewhat higher" (less than 10% higher)

Overnight summer camp enrollment

Respondents were asked to provide enrollment numbers for both summer 2021 and summer 2022 for several programs they indicated offering. For overnight summer camp:

For 2021, 57 camps provided data (including 3 that served 0 campers)

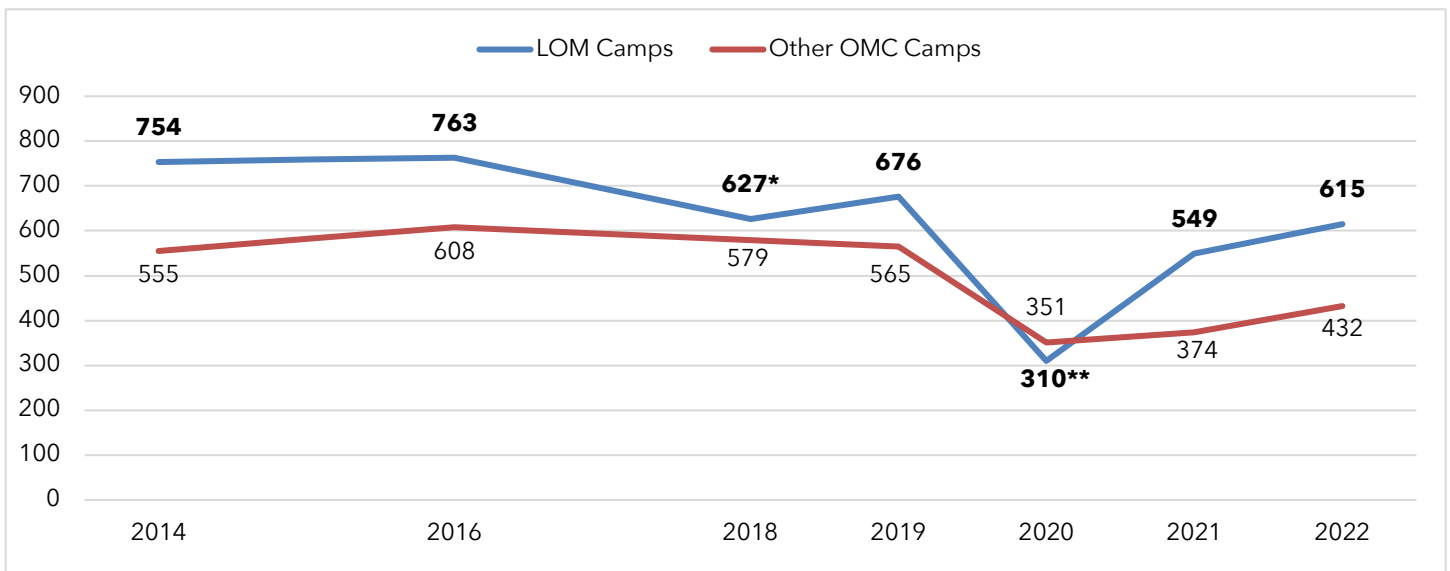
- Of those who served campers, average overnight camper enrollment was **549**
- A third of camps enrolled fewer than 250 overnight campers, a third 250-699, and a third 700 or more campers
- The top 10% enrolled 1000 or more campers
- Together, these camps served **29,621** overnight campers

For 2022, 57 camps provided data (1 served 0 campers)

- Average overnight camper enrollment was **615**
- A third of camps enrolled fewer than 350 overnight campers, a third 350-700, and a third more than 700 campers
- The top 10% enrolled 1200 or more campers
- Together, they served **34,426** overnight campers (an increase of 16% over the same camps in 2021)

Average Number of Overnight Summer Campers, 2014-2022

FIGURE 15



*The drop in average summer camp numbers in 2018 is notable as the year of the triennial ELCA Youth Gathering

**88% of camps canceled their overnight camp programs in 2020. This number represents only those camps that offered overnight camp programs.

Day Camp Enrollment

45 camps indicated that they operated on-site day camp programs.

In 2021, 28 of these camps operated day camp and provided enrollment data

- Average day camp enrollment was **147**
- Half of camps enrolled 60 or fewer day campers
- Together, these camps served **4,127** day campers

In 2022, 30 camps operated day camp and provided enrollment data

- Average day camp enrollment was **315**
- Half of camps enrolled 80 or fewer day campers
- Together, they served **5,815** day campers (41% increase over the same camps in 2021)

Family Camp Enrollment

84% of LOM camps indicated that they operated family camp programs.

In 2021, 45 of these camps operated family camp and provided enrollment data

- Average family camp enrollment was **168**
- Half of camps enrolled 70 or fewer family campers, a quarter 71-149, and a quarter 150 or more participants
- Together, these camps served **7,573** family campers

In 2022, 48 camps operated family camp and provided enrollment data

- Average family camp enrollment was **178**
- Half of camps enrolled 85 or fewer family campers, a quarter 86-150, and a quarter more than 150 participants
- Together, they served **8,562** family campers (13% increase over the same camps in 2021)

Leadership Training Programs

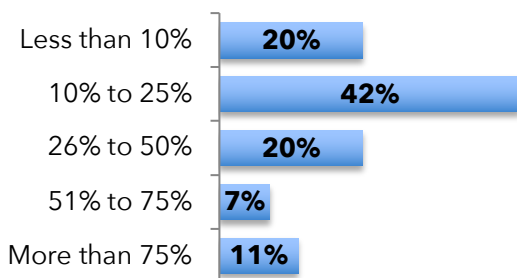
68% of LOM camps indicated that they offered leadership training programs.

In 2022, 36 of these camps operated leadership training programs and provided enrollment data

- Average leadership training enrollment was **22**
- Half of all camps enrolled 10 or fewer participants in their program, a quarter 11-30, and the remaining quarter more than 30 participants

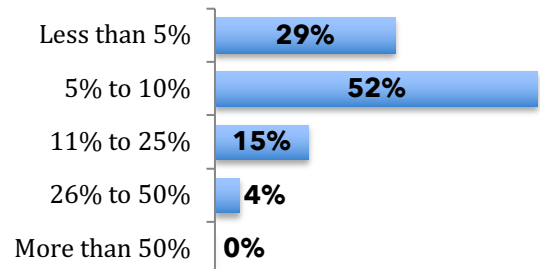
% of Campers Receiving Financial Assistance

FIGURE 16A, n=55



% of Campers Representing Racial Minorities

FIGURE 16B, n=54





Summer Camp Fees

Average weekly camp fee in LOM **\$482 USD**

- A third of LOM camps charged less than \$450 for a week of camp, a third charged \$450-\$499, and the remaining third charged \$500 or more per week.
- The average of \$482 was up from \$452 in 2020 and \$430 in 2018

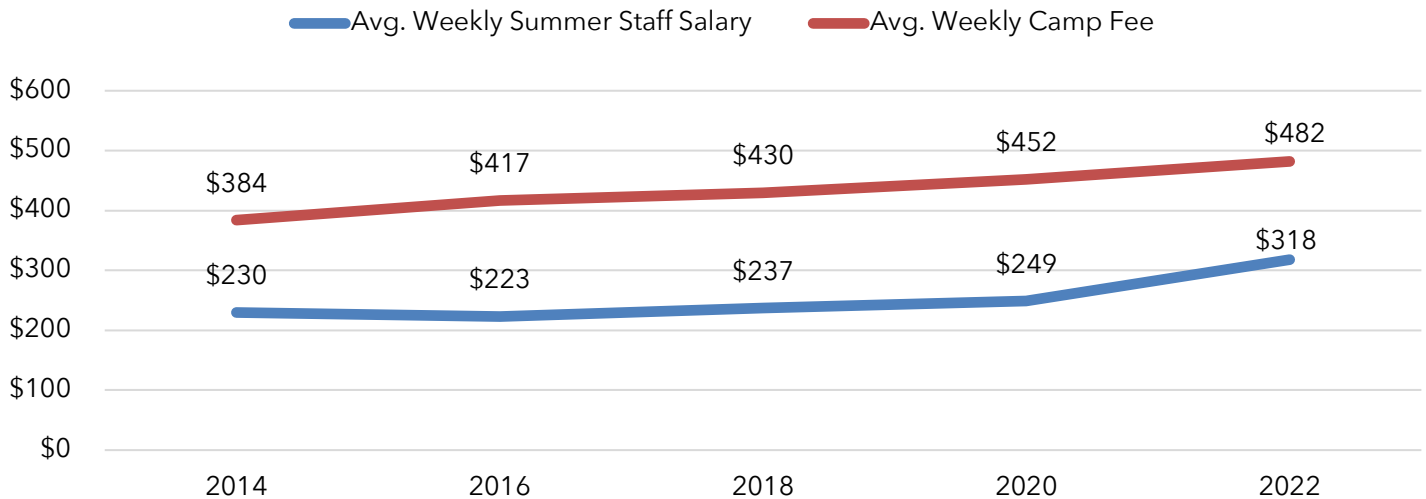
Average Weekly Camp Fee, by Geographic Region

FIGURE 17A

	Northeast	Midwest	South U.S.	West U.S.	All USA
LOM Camps	\$511	\$478	\$499	\$448	\$482
Other OMC Camps	\$521	\$460	\$507	\$496	\$496

LOM Summer Staff Weekly Salary and Weekly Camper Fee Trends 2014-2022

FIGURE 17B



- The average fee for a week of summer camp at LOM camps rose 25.5% from 2014 to 2022, higher than the rate of inflation (approximately 22.9% cumulatively, with most occurring from 2020-2022). The average LOM summer staff weekly salary rose 8% from 2014-2020 and then jumped by 27.5% in 2022.



Summer Camp Staff

Average weekly summer staff salary **\$318 USD**

- A third of LOM camps paid summer staff \$350 or more per week. At the low end, a third paid \$274 or less per week. The middle third paid between \$275 and \$349 per week. The top 10% paid \$400 or more per week.
- In addition to salary, common benefits were room and board (98%), bonus for returning staff (70%), bonus for special certifications (47%), and bonus for recruiting another staff member (67%)

Average Weekly Summer Staff Salary by Geographic Region

FIGURE 18A

	Northeast	Midwest	South U.S.	West U.S.	All U.S.
LOM Camps	\$329	\$323	\$253	\$334	\$318
Other OMC Camps	\$349	\$313	\$273	\$375	\$313

FIGURE 18B: Staffing Structure

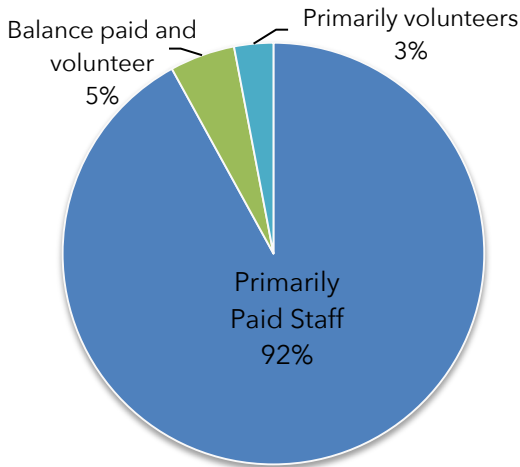
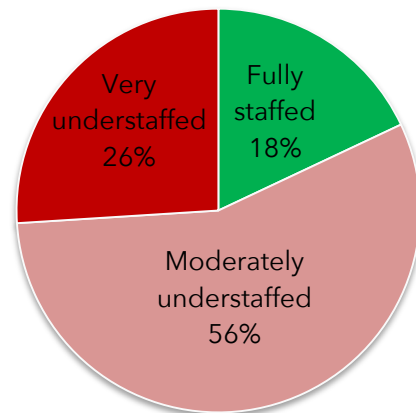


FIGURE 18C: Staffing Level



% of Summer Staff Returning from previous summers

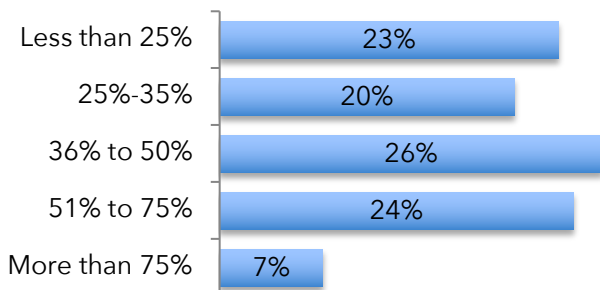


FIGURE 18D, n=61

% of Summer Staff Representing Racial Minorities

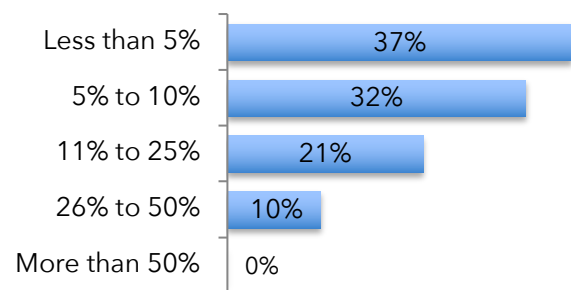


FIGURE 18E, n=62



Retreats and Conferences

Primary clientele for retreats/conferences

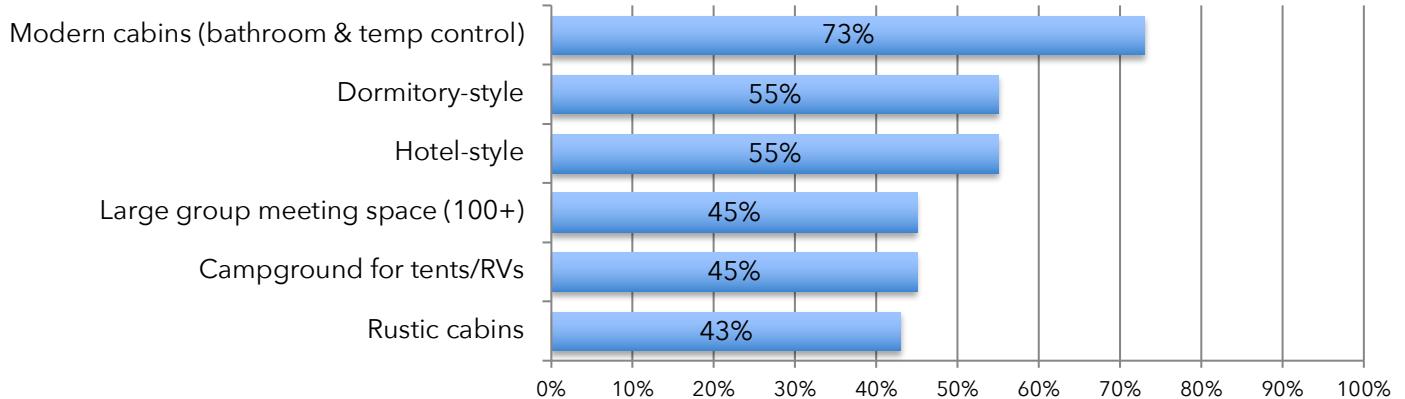
- 67% Mix of children, youth, adults, and families
- 26% Primarily **adults**
- 7% Primarily **youth/children**

Retreat/Conference Ministry Summary

- 8% Primarily or exclusively user groups and facility rental
- 65% Majority user groups/facility rental with some programmed/hosted retreats
- 22% Balance of user group/facility rental and programmed/hosted retreats
- 3% Majority (or primarily) programmed/hosted retreats

Retreat Accommodations Offered

FIGURE 19A, n=60



Seasonal Retreat Staff, Fall 2022

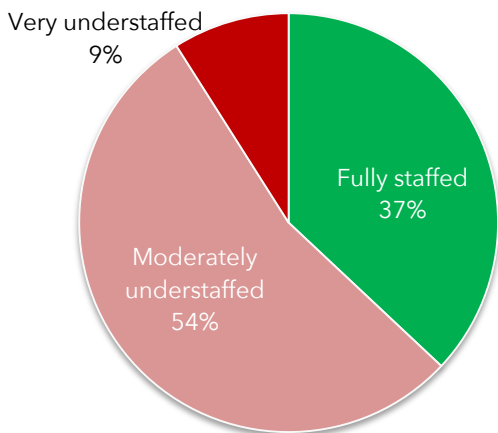


FIGURE 19B, n=59

Percentage of Retreat/Conference Guests Affiliated with Constituent Denomination(s)

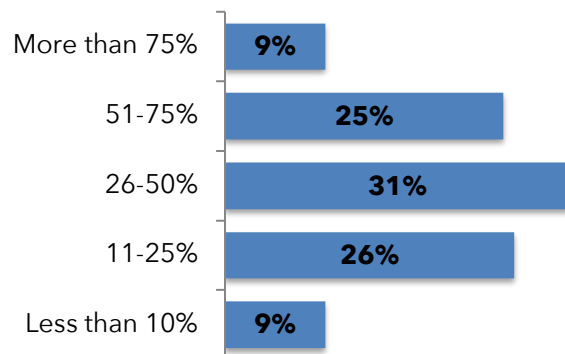
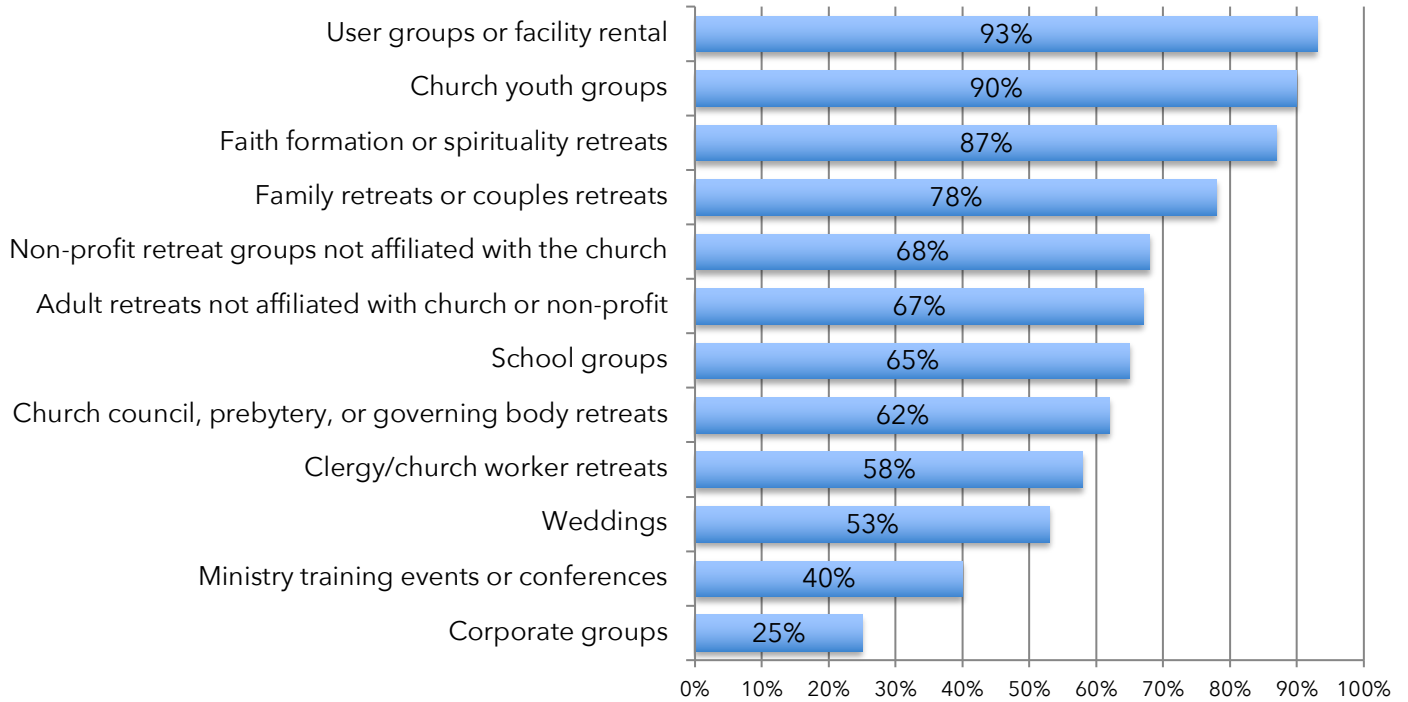


FIGURE 19C, n=55

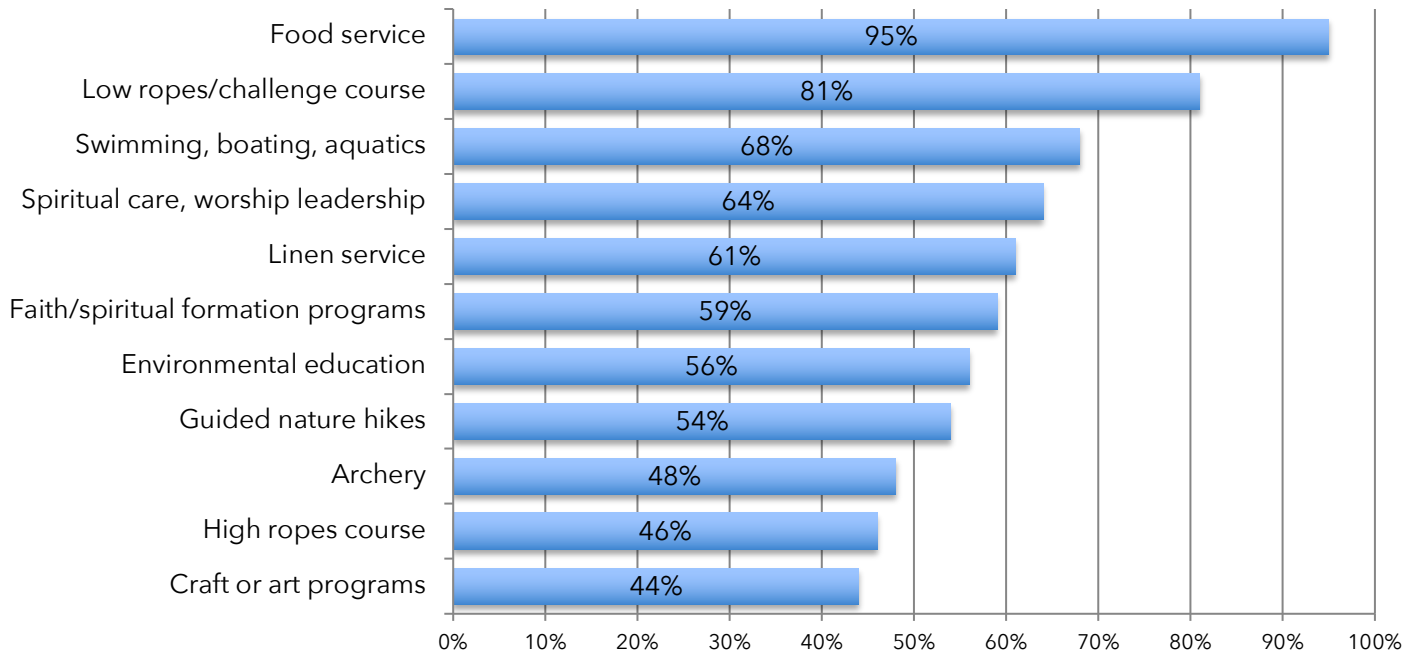
Retreat/Conference Center Programs Offered on a Regular Basis

FIGURE 20A, n=60



% Camps Offering Selected Retreat Amenities and Programs

FIGURE 20B, n=60





Overnight capacity for retreats/conferences

OUT OF 58 MINISTRY CENTERS

A quarter of ministry centers indicated that their overnight retreat capacity was fewer than 90 guests. Another quarter reported a capacity between 90 and 149 guests. Another quarter could accommodate between 150 and 199. The remaining quarter could accommodate 200 or more guests overnight. Average overnight capacity was 151 guests, close to the average for other OMC retreat centers (163).

Retreat/Conference Center Usage Trends

FIGURE 21

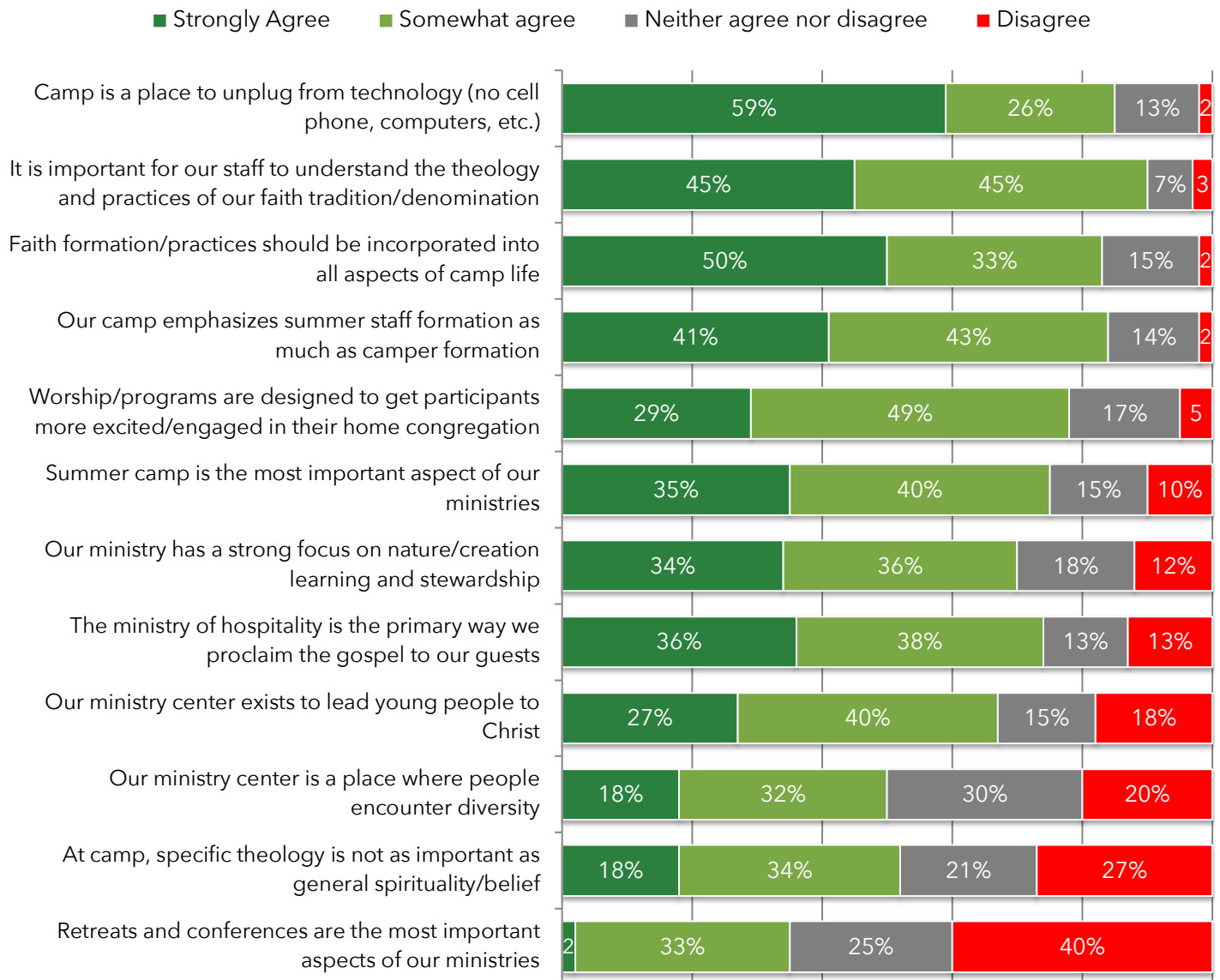
	2016 LOM	2018 LOM <i>n=77</i>	2020 LOM <i>n=65</i>	2022 LOM Sites <i>n=57</i>	Other OMC Sites 2022 <i>n=186</i>
90% capacity or higher on weekends	4%	6%	1%	9%	11%
75% to 89% capacity on weekends	16%	30%	2%	24%	28%
50% to 74% capacity on weekends	37%	30%	5%	35%	32%
Less than 50% capacity on weekends	43%	33%	92%	32%	29%
Much HIGHER than previous year (> 10%)	46%	9%	2%	33%	38%
Somewhat higher than previous year (< 10%)		38%	3%	40%	35%
About the same as previous year	37%	35%	3%	25%	16%
Somewhat lower than previous year (< 10%)	17%	13%	5%	2%	6%
Much LOWER than previous year (> 10%)		5%	87%	0%	5%
Highest of past 5 years	17%	13%	1%	10%	12%
Higher than most of past 5 years	28%	36%	5%	25%	20%
About the same as past 5 years	40%	38%	2%	30%	31%
Lower than most of past 5 years	15%	12%	1%	35%	33%
Lowest of past 5 years	0%	1%	91%	0%	4%



Ministry Center Philosophy

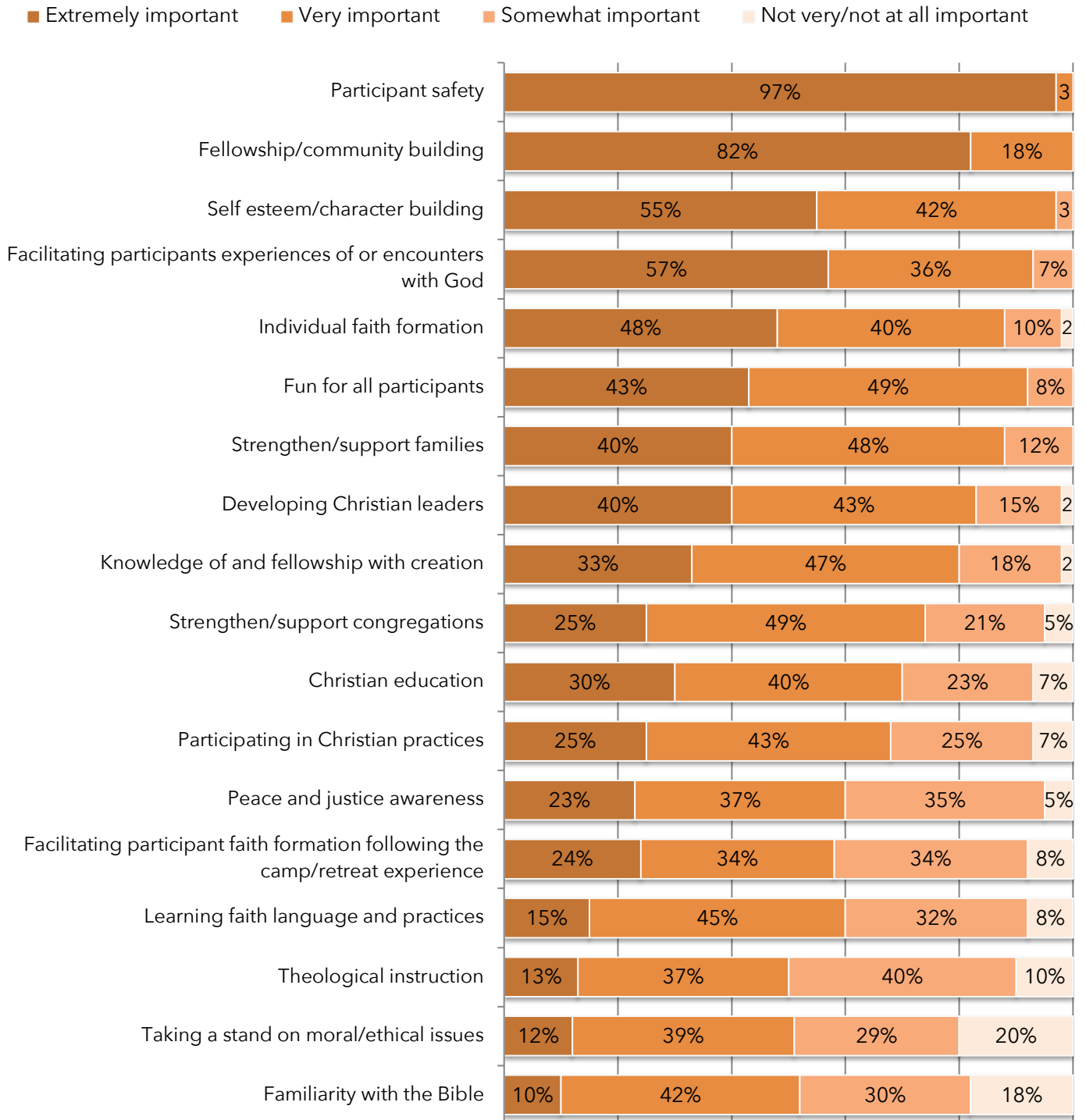
Level of Agreement with Philosophy Statements about Ministry Site

FIGURE 22, n=61



Level of Importance Assigned to Selected Program Priorities

FIGURE 23, n=61





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