

Long Island Private School and Day Camp Industry

Study of Economic Impacts on Nassau and Suffolk Counties



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Prepared for:

Long Island Association of
Private Schools and Day Camps

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www.shepstone.net/LongIslandCamps.pdf

Acknowledgments

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Summary of Findings

- ◆ **Day camps and private schools are concentrated in Nassau County and nearby parts of Suffolk County.** Some 62% of both day camps and private schools surveyed are located in Nassau County.
- ◆ **Day camps and private schools demonstrate remarkable business longevity.** Some 75% of day camps and 51% of private schools have been in business for 50+ years.
- ◆ **Day camps and private schools preserve large land areas on Long Island for recreation and open space.** The average day camp owns 16 acres of land. The average private school owns 11 acres.
- ◆ **Long Island's day camps and private schools include several very large capacity facilities.** The typical day camp has a capacity of 785 campers. The average winter-time school capacity is 172 participants.
- ◆ **There is a large variety of recreational facilities among camps and schools.** All day camps offer pools, playgrounds, basketball and ball fields. Some 83% provide tennis. All schools offer playgrounds and 88% have ball fields.
- ◆ **Long Island's day camps and private schools serve large areas of Nassau and Suffolk Counties.** Some 55% of day camps and private schools draw from market areas of 10 to 20 miles radius.
- ◆ **Day camps and private schools serve children of virtually all ages.** Some 61% of day campers are 8 years old or younger, while 86% of private school participant are 4 years old or younger.
- ◆ **Long Island's day camps and private schools also involve the parents of the children they serve in their activities.** Day camps surveyed, in fact, actually employed an average of 30.6 parents as staff members.
- ◆ **The range of activities in which day camps and private schools involve their children and staff include numerous different events and programs.** Some 83% of day camps, for example, take campers to ball games and beaches and 92% go to parks as activities.
- ◆ **Long Island's day camps and private schools exhibit high levels of customer satisfaction with services.** The average return rate for day camps is 69%. Private schools are at 75%. Some 67% of camps grew last year and 50% expect to grow more this year.
- ◆ **Day camp and private school children come largely from Mid-Island and Western Nassau County locations.** Five major zip code areas are home to the bulk of parents with 94% residing in Nassau/Suffolk Counties while 6% reside elsewhere.
- ◆ **The number of children sent by families to Long Island day camps or private schools also demonstrates high customer satisfaction.** Some 20% have two children enrolled with an average of 1.43 children. Some 98% rated the camps and schools as excellent.
- ◆ **Although reasons for choosing camps and schools are varied, 34% of parents say programs offered were prime factors.** Other reasons included the philosophy of the camp/school, facilities available and the location (80% being "very satisfied" on this score).
- ◆ **Parents of day campers and private school enrollees are very involved in activities.** Some 22% visited their child's camp/school 11+ times during the season, 7.8% of these families having volunteered as staff members and 23.5% having served as paid staff.

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- ◆ **The transportation provided by Long Island’s day camps and private schools is used by 75% of families and viewed as “very important” or “important” by 84% of parents.** Importantly, 98% of users are “very satisfied” or “satisfied” with this service.
- ◆ **What parents value most about Long Island’s day camps and private schools is the quality of the care provided to their children.** Across the board, parents indicate staff members employed by day camps and private schools are excellent.
- ◆ **Day camps and private schools provide job opportunities for Nassau and Suffolk County residents, with 94% of all employees residing in these Counties.** The typical employee has worked 12.1 years and for an average of 139.5 days per year.
- ◆ **Day camp and private school employees are very satisfied with their jobs.** Blind surveys of employees indicate 98% of all employees are either “satisfied” or “very satisfied” with their employment, 77% citing enjoyability of work as a reason for working there.
- ◆ **Day camp and private school employees earn good wages for their mostly seasonal or part-time work.** The average salary of those surveyed was \$15,216. Some 91% say they are likely to stay in the area due to the camp/school.
- ◆ **Employees of camps and schools see many specific positive impacts on their communities.** They point to contributions to local fund raising events, classes that benefit residents, camps that work with diabetic children and green belt advantages as examples.
- ◆ **Parents of day campers visit camp often and spend money locally while doing so.** Total parent expenditures on visits are as much as \$185.67 when average spending on items such as retail, groceries, restaurants, transportation and entertainment are combined.
- ◆ **Day camps and private schools are, themselves, major spenders within the communities they serve.** Some 19% spend \$2 million or more annually. The average day camp expenditures are \$2,514,050, while the private school average is \$1,257,500.
- ◆ **Payroll is the top spending category for both day camps and private schools.** The average payroll expenditure for camps is \$1,039,500 and for private schools it is \$677,533. Camps purchase 86% of their products and services locally and schools 92%.
- ◆ **Melville (20%), Plainview (18%) and Hicksville (17%) are the primary shopping areas for day camps and private schools.** Spending will increase in the next few years, given the current cost of transportation and the increased capacity these facilities are now offering.
- ◆ **Total local spending by the member facilities of the Long Island Association of Private Schools and Day Camps Day camps and Private Schools is very large.** Total day camp spending is estimated at \$57,823,150 with another \$18,862,500 spent at private schools. This does not include the numerous other camps/schools not part of the Association.
- ◆ **There are large multiplier benefits from this spending as it ripples through the local economy.** Altogether, the day camp and private school industry is responsible for a \$143.9 million contribution to the Nassau/Suffolk economy. The industry also directly generates an estimated 7,501 full-time, seasonal and part-time jobs and another 3,753 jobs indirectly.
- ◆ **Major investments are planned over the next five years by Long Island’s day camps and private schools.** The average planned investment is \$527,083 for each camp and \$141,129 for each school. The bulk of these funds will be spent on building improvements.
- ◆ **Day camps and private schools offer many special benefits to neighbors and parents.** These include parking for fire company picnics, discounts of up to 50% for children of families bordering facilities and early-care or after-care programs for parent convenience.

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- ◆ **Day camps and private schools also make large charitable contributions.** The typical day camp provides \$10,365 in cash and \$27,250 in non-cash contributions. The typical private school provides \$3,617 in charitable cash contributions and \$10,000 in non-cash.
- ◆ **Long Island's day camps and private schools are major taxpayers.** Altogether, the members of the Association pay an estimated \$1,223,824 in New York State sales tax and \$4,676,345 in property taxes. The average camp/school pays \$123,062 in property taxes.
- ◆ **Return rates are high for day camp and private school employees at 67% and 91%, respectively.** These are excellent rates indicating high levels of job satisfaction.
- ◆ **Altogether, the Long Island Association of Private Schools and Day Camps serves an estimated 18,515 children, of which 16,200 go to day camps and 2,730 to private schools.** Camps serve an average of 805 children with 720 being transported or 89% of the total. For private schools, the average is 182 children, with 139 transported or 76% of the total.
- ◆ **Camp and school scholarships represent still another economic contribution.** Day camps provide an average of 9.5 scholarships each at an average combined value of \$24,557. The number of private school scholarships provided annually is an average of 5, which represents \$8,000 in combined value.

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1.0 Study Background and Methodology

The private school and day camp industry is one of Long Island's most valuable economic and recreational assets. It contributes in several ways to the local economy, while preserving valuable areas of open space in many instances. This study, undertaken in 2005–2006, reveals the extremely important nature of those contributions. It was conducted under the Long Island Association of Private Schools and Day Camps in cooperation with consultants Thomas J. Shepstone, AICP and Howard J. Grossman, AICP, the Skier Foundation providing help with the funding of the project.

This study was accomplished under the direction of the Association's Board of Directors. Surveys of member camps, parents and employees of the various camps were done by questionnaire. Additional information from the American Camping Association, U.S. Bureau of Economic Analysis and other sources was also compiled by the independent consultant team, which is responsible for analysis and conclusions contained in this report. Finally, data from the Nassau County Real Property Tax Services Department was utilized to help confirm the tax contributions of Association members.

Some 23 Association member organizations were mailed surveys. Altogether, some 13 day camps organizations and 8 private school entities responded. All of the private school facilities surveyed also operated day camps and completed separate surveys for these that were included among the 13 camps surveyed. This 55% response rate was an excellent return. Each responding camp was also asked to send out 10 parent and 10 employee surveys for return to the consultants. Some 51 parent and 60 employee responses were obtained for response rates of 20% and 23%, respectively, also excellent. Copies of the survey instruments used are attached as Appendix 2.

Like any other economic sector, the Long Island private school and day camp industry produces both direct and indirect impacts on the area. Both were studied. Direct impacts are the immediate contributions to the local economy. These occur in the form of; a) jobs created, b) income received and expended to vendors, and c) taxes and services contributed. Indirect impacts are those generated from income being recycled throughout the local economy several times as the original monies spent are re-spent on goods and services purchases. Some portion of those funds stay within the area as they are re-spent and this is what is commonly known as the multiplier effect.

Given this background, the purposes of this study were to:

1. Demonstrate the direct and indirect impacts of the camp industry on Long Island.
2. Promote the voice of the industry with local and State officials.
3. Document the added value contributed to the area economy and quality of life.

The following sections detail the results of the surveys conducted, analyzing this and other information to draw conclusions and offer recommendations.

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2.0 Overview of the Day Camp and Private School Industry

The day camp industry has a long history on Long Island. The Long Island Association of Private Schools and Day Camps includes numerous members of decades-long standing and many that have existed for 50 years or more (one 76 years). There are over two-dozen members of this group alone and numerous other day camps throughout Nassau and Suffolk Counties. The U.S. camping industry includes roughly 12,000 facilities, of which about 4,000–5,000 are day camps. The American Camping Association (ACA) lists approximately 100 day camps within New York State (not including Upstate New York), half of which are located on Long Island. There are also several additional day camps and private schools not listed by ACA.

Day camps and private schools are often operated by the same organizations, although there are many independent day camps as well. The day camps typically provide 8 week programs while the private schools operate over a period of 39–40 weeks in length. The program formats vary but usually include heavy elements of outdoor recreation, combined with some education and basic child care. Facilities range widely in size but often preserve relatively large areas of what is effectively parkland in the middle of densely populated urban areas. Indeed, one of the major values of private schools and day camps on Long Island is the community character they help preserve.

Economically, these facilities represent major businesses and tax producers. Notwithstanding the considerable importance of these contributions, which are documented throughout this report, the most positive aspect of this industry may well be the increased quality of life it permits by offering child care in a wholesome environment that is close to home for Long Island families. Health, education and recreation are the key words emblazoned on the Association's logo. These three words accurately summarize the non-economic benefits of private schools and day camps. When the value of the transportation services provided by the facilities is added, it becomes very clear just how important they are to the culture of Long Island, let alone its economy.

A major new multi-year research study, entitled *Youth Development Outcomes of the Camp Experience*, was completed for the ACA by Philliber Research Associates in 2005 (see www.acacamps.org/research/research_book.pdf). Some 29% of the camps surveyed were day camps. Altogether, over 5,000 campers were involved. The study documents, through pre-camp and post-camp surveys, that camping experiences help children build positive identities and develop social skills. They also increase physical and thinking skills, assist in creating positive values and promote spiritual growth.

Many of the Association's member camps and schools participate in accreditation programs that ensure proper attention is paid to all these matters. Among the accreditation programs are those operated by the ACA and the National Academy of Early Childhood Education. Various facilities are also licensed by New York State.

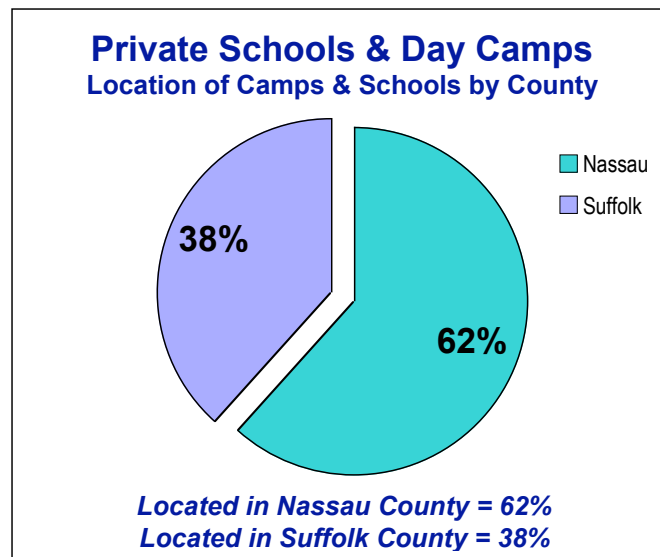
Preserving and further developing the industry is important to both Nassau and Suffolk Counties. This report is intended to provide a foundation for such a continuing effort.

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3.0 Long Island Day Camp and Private School Characteristics

Basic characteristics of the Long Island day camp and private school industry are illustrated in the charts and tables following. They offer some detailed insight into the nature and status of these facilities. They also provide a foundation for evaluating the economic impacts of the industry on the communities where they are located, their contributions to the counties of Nassau and Suffolk, and their importance to the State of New York.

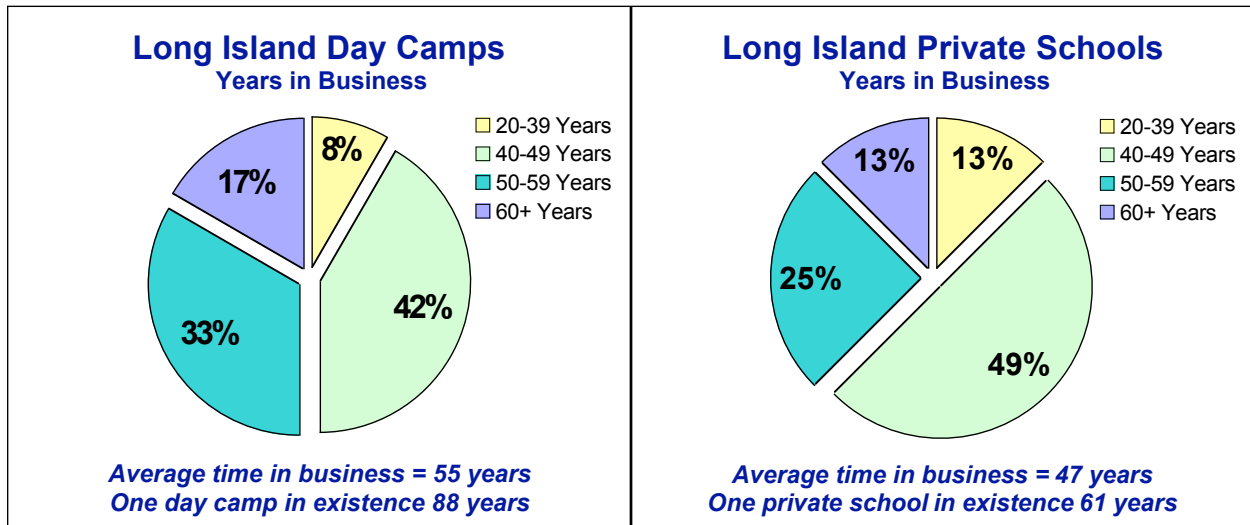
Day camps and private schools are concentrated in Nassau County and nearby parts of Suffolk County. The charts below indicate 62% of Association member day camps and private schools surveyed are located in Nassau County, while 38% are situated in Suffolk County. The membership of the Association demonstrates similar patterns, indicating day camps and private schools tend to be located in more urban areas. They depend upon large concentrations of population as a business base to support services such as transportation but, at the same time, provide relief from congestion in the form of recreation and open space. They also satisfy a great need for wholesome child care in an environment of two-worker families.



Day camps and private schools demonstrate remarkable business longevity. Some 42% of day camps have been in business for 40-49 years, while 50% have been in business 50-69 years. All of the day camps have been in business at least 20 years, showing the stability and capacity of these enterprises as compared to other businesses. Private schools demonstrate similar stability. Some 49% have been in business for 30-49 years, while 38% have been in business 50 or more years.

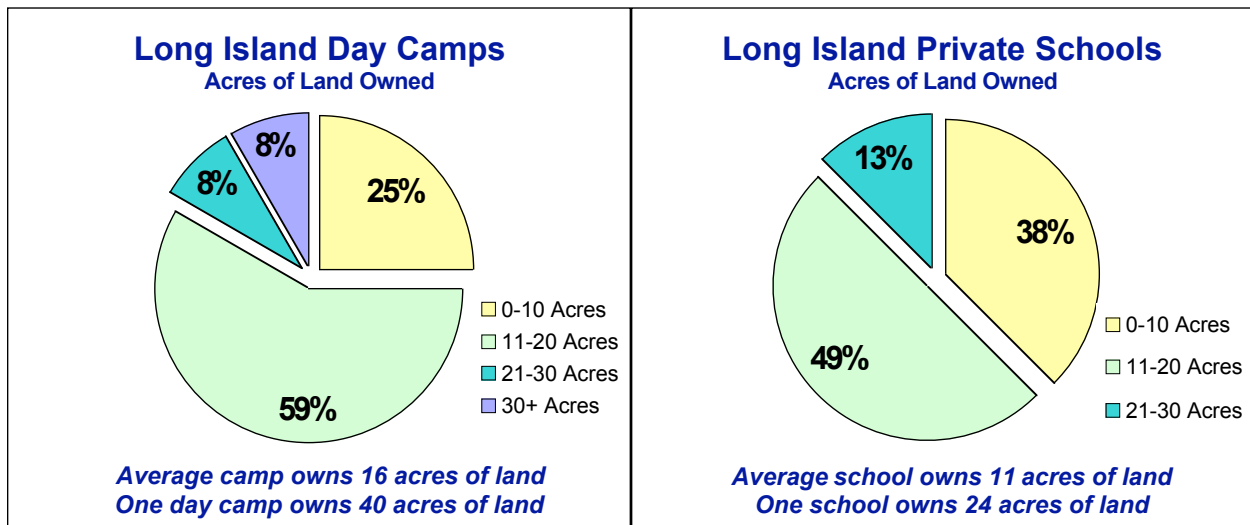
This staying power is an important indicator of the sustained economic impact of day camps and private schools on Long Island. It also indicates these facilities serve to retain an important aspect of the local culture amidst rapid change in other elements.

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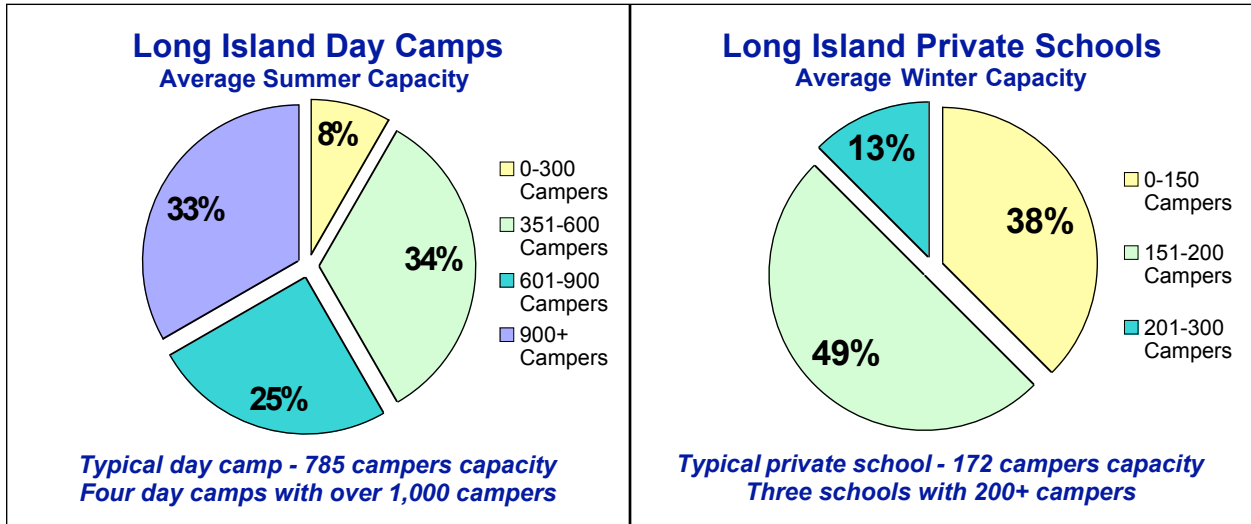
Day camps and private schools hold large land areas on Long Island for recreation and open space use. The chart below indicates 75% of day camps have more than 10 acres, while 16% have 20 or more acres. Some 8% of day camps own 30 or more acres. Given Long island’s immense suburban development pressure, holding significant land areas such as these for extended periods of time is a critical factor not only to maintaining the businesses, but also ensuring the continued quality of life of the community.

The average day camp owns 16 acres of land and one camp owns fully 40 acres of land. Private schools tracts are smaller but still significant. The private school chart indicates 62% of these facilities own more than 10 acres. The average private school owns 11 acres of land and one school owns 24 acres of land. These are relatively large parcels in an area of the country typified by high-density suburban development patterns.

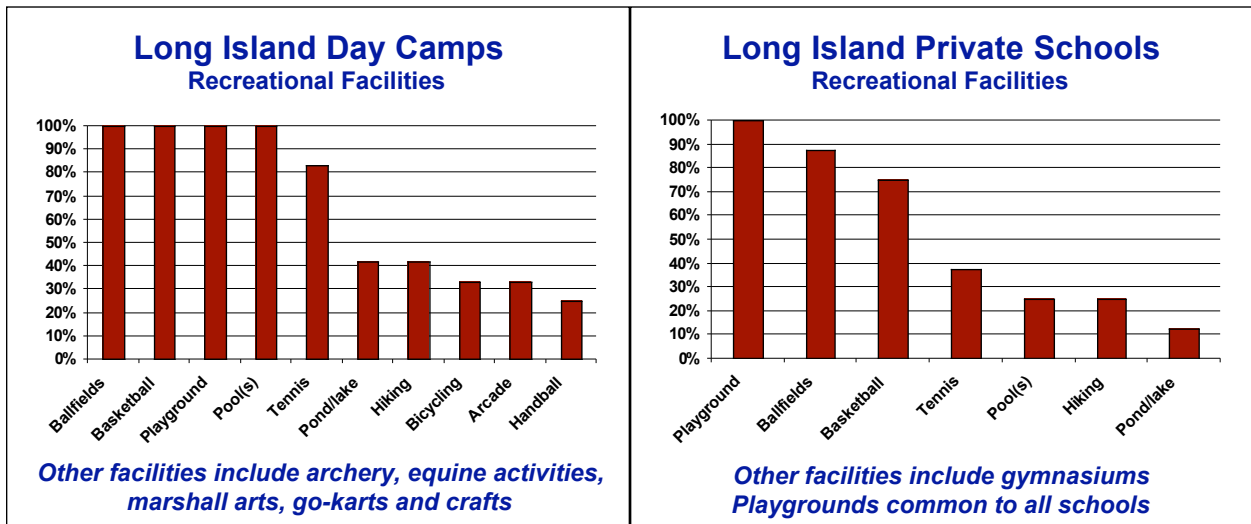


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Long Island's day camps and private schools include several very large capacity facilities. The summer capacity of day camps varies considerably, but is substantial in all cases. Some 34% of camps accommodate 351-600 campers while 33% can take 900+ campers. The typical day camp has a capacity of 785 campers. The capacity of private schools also varies, 49% of these facilities being able to take 151-200 participants and 13% having capacity for up to 300 children. The average winter school capacity is 172 participants.



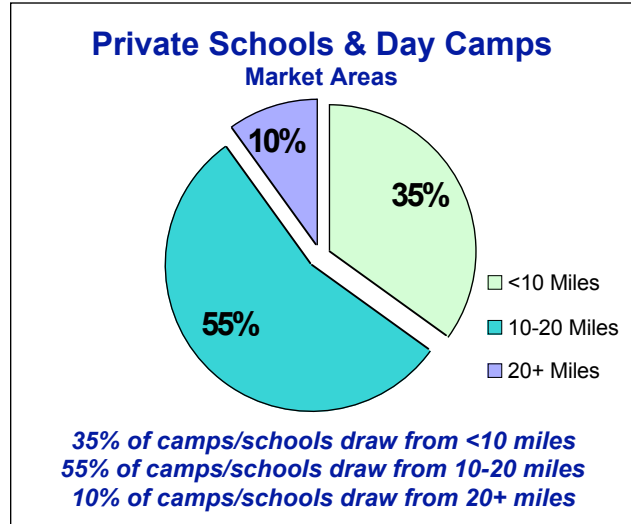
There is a large variety of recreational facilities among camps and schools. There are at least 10 different types of recreational facilities offered at day camps. All day camps offer pools, playgrounds, basketball and ball fields. Some 83% provide tennis along with many other activities. Recreational activities beyond the basics include archery, equine programs, martial arts, go-karts and crafts. Private schools concentrate on the basics with 100% offering playgrounds, 88% having ball fields and 75% providing basketball facilities. Other school activities include pools and tennis.



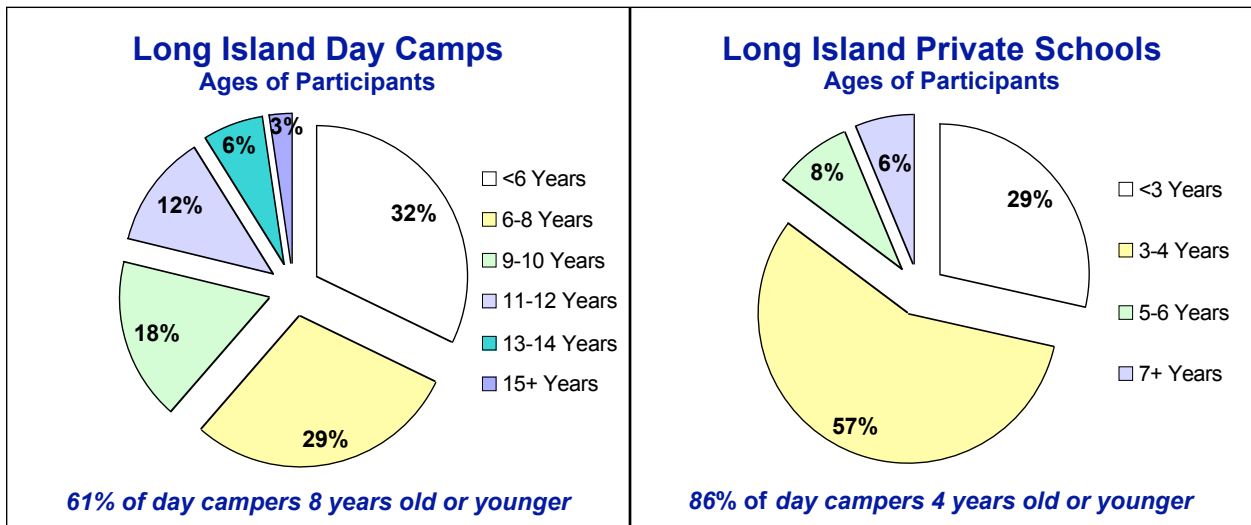
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Long Island's day camps and private schools serve large areas of Nassau and Suffolk Counties. Survey responses indicate 35% of camps and schools draw from market areas of 10 miles radius, another 55% pull customers from 10 to 20 miles and 10% attract customers from a 20+ mile radius.

However, day camps have much larger market areas than private schools. The latter draw all their children from markets of less than 10 miles, while the former obtain only 13% from this market area and 75% from a 10 to 20 mile radius.



Day camps and private schools serve children of virtually all ages. Day campers are drawn primarily from ages of 10 years or younger, with 32% less than 6 years of age, 29% in the 6-8 year old group and 18% in the 9-10 year category. Some 61% of day campers are 8 years old or younger. In the case of private school students, 57% are in the age 3-4 group, 29% are less than 3 years old and 8% are in the 5-6 year age group. Some 86% of private school attendees are 4 years old or younger.



Long Island's day camps and private schools also involve the parents of children they serve in their activities. Day camps surveyed, in fact, actually employed an average of 30.6 parents as staff members. Private schools hired an average of 2.5 parents each.

The range of activities in which day camps and private schools involve their children and staff include numerous different events and programs. One-half of camps take children to shows and visit museums, 58% go to zoos, 83% take campers

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to ball games and beaches and 92% go to parks as activities. Still other activities include visits to waterparks, arcades and even fishing events. Most of these activities are local, the camp visits being a source of additional business for these venues.

**Long Island Private Schools & Day Camps
Activities and Parent Participation**

Parents Typically Employed as Staff:

- Day camps - 30.6 parents on average
- Private schools - 2.5 parents on average

Typical Children's Activities:

- 50% of day camps take children to shows
- 58% of day camps take children to zoos
- 83% of day camps take children to ball games
- 92% of day camps take children to parks
- 83% of day camps take children to beaches
- 50% of day camps take children to museums

Day camps also visit waterparks, arcades and hotels and go fishing
Private schools visit libraries, fire houses and post offices

- 81% of attractions visited by day camps are local
- 100% of attractions visited by schools are local

Quality of services:

- 69% of day camp children return the next year
- 75% of private school children return the next year
- 67% of day camps experienced growth last year (17% level)
- 50% of private schools experienced growth last year (13% level)
- 50% of day camps expect to grow next year (42% stay level)
- 38% of private schools expect to grow next year (62% stay level)

The experience of Long Island's day camps and private schools suggests high levels of customer satisfaction with services. Although a large number of children graduate from day camp and private school programs every year by virtue of age alone, the average return rate for day camps is 69%. Private schools do even better at 75% on average.

Some 67% of camp owners said they grew last year and 50% expect to grow more this year. Likewise, 50% of private schools indicated they grew their businesses last year and the same number expected growth during the coming year.

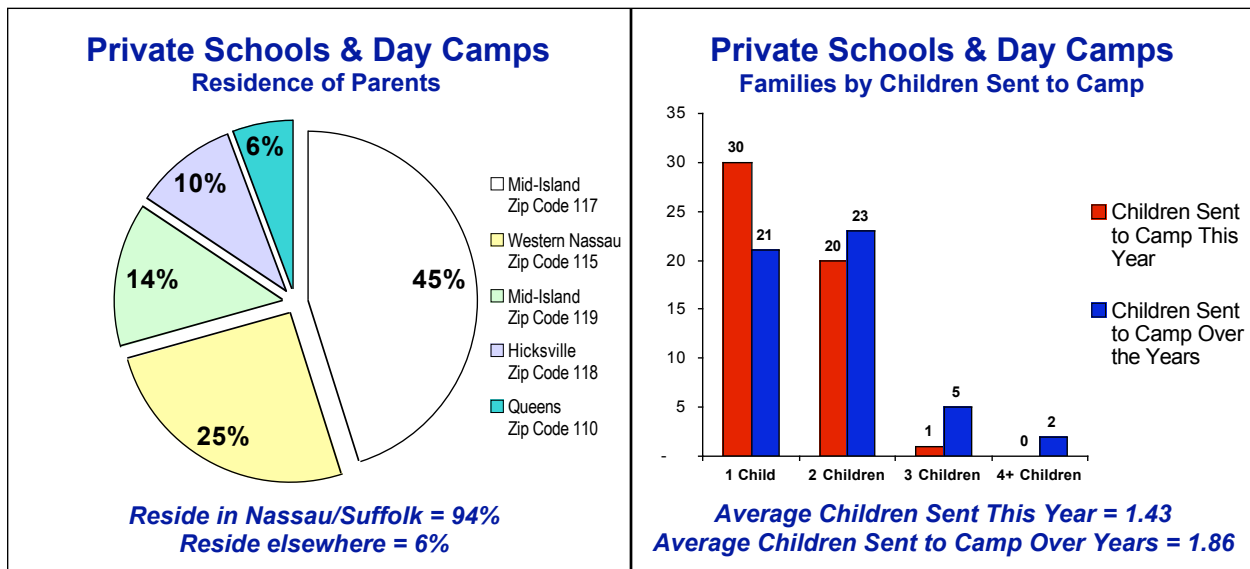
These trends support the view that Long Island's day camps and private schools are providing a very valuable service and not only are likely to be around a long time but also continue to grow in size and importance to the communities they serve.

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4.0 Direct Impacts of Day Camps and Private Schools

The unique nature of the day camp and private school industry sector in Nassau and Suffolk Counties is demonstrated by the results of the parent and employee surveys conducted. These two surveys measured the direct impacts camps and schools have had within the communities they serve. The accompanying charts illustrate.

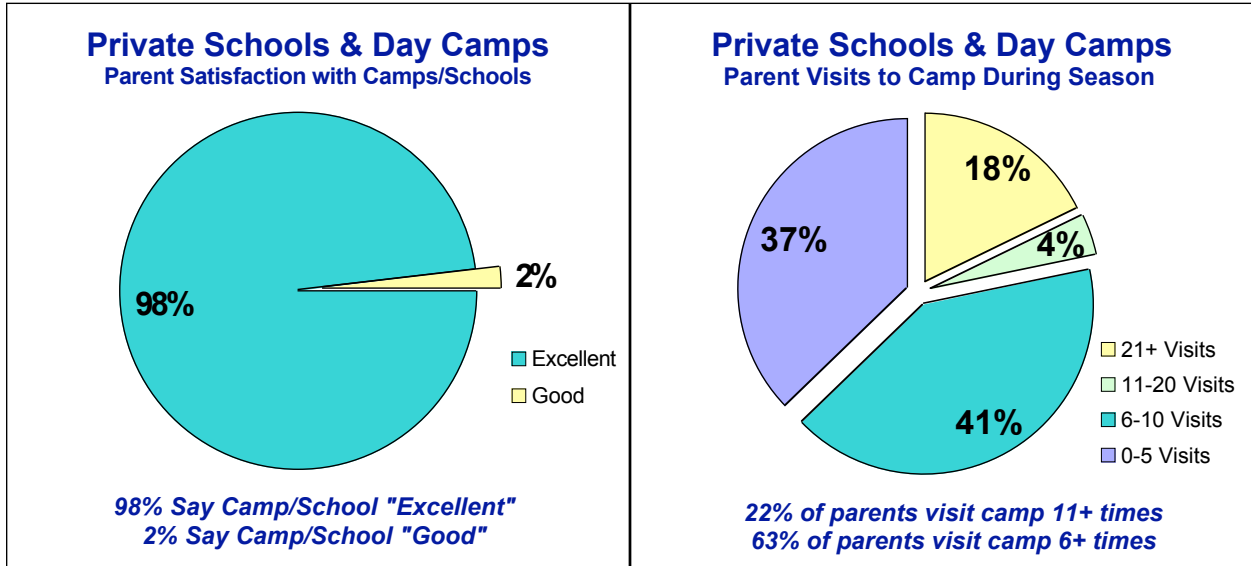
Day camp and private school children come largely from Mid-Island and Western Nassau County locations. Five major zip code areas are home to the bulk of parents with 94% residing in Nassau/Suffolk Counties while 6% reside elsewhere. Close to 50% come from in Zip Code 117, which is defined as Mid-Island. Another 25% come from Zip Code 115, which is defined as Western Nassau County.



The average number of children sent by families to Long Island day camps or private schools once again demonstrates a high level of customer satisfaction. Significantly, 20% of families had two children enrolled. The average number of children sent to camp or school was 1.43. The average number of children sent over years was 1.86, indicating that many families send multiple children to day camps or private schools.

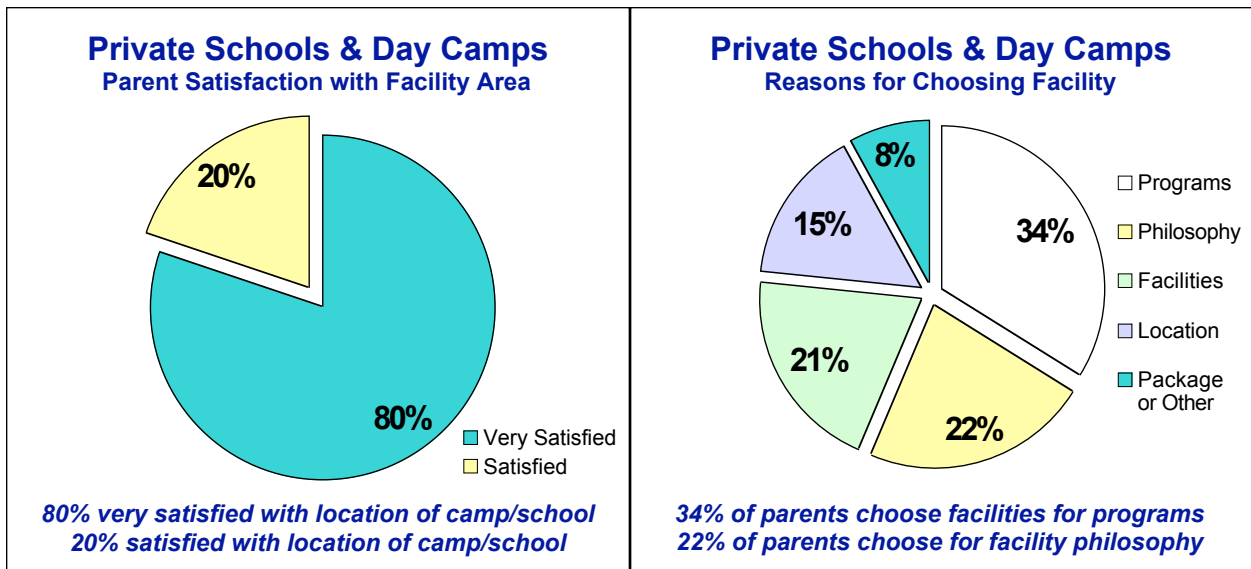
This satisfaction was confirmed with additional information regarding parent perspectives on those day camps and private schools with which they had experience. The data is quite revealing. Some 98% of parents rated the camps and schools as excellent while the remaining 2% rated them as good. Parents perceive that Long Island’s day camps and private schools are providing excellent value, offering the industry sector a tremendous marketing tool for the future. These survey results are consistent with the the previously discussed American Camping Association study entitled *Youth Development Outcomes of the Camp Experience* (see Section 2.0), wherein several positive features of camping experiences were identified.

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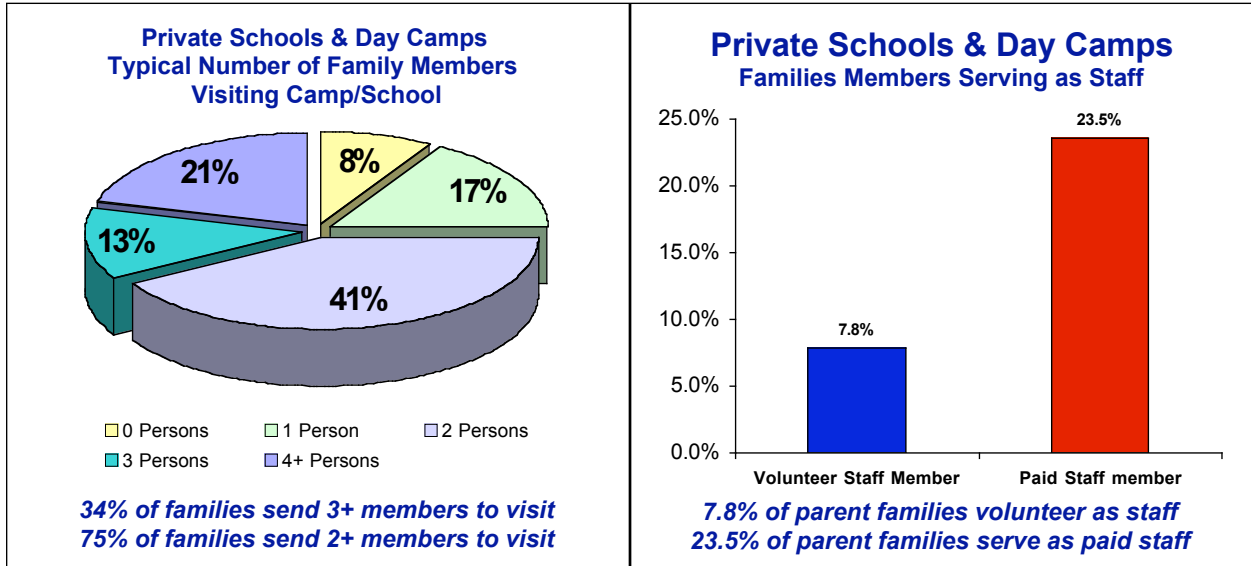
Although the reasons for choosing camps and day schools were quite varied, **34% of parents said the overall programs offered were a prime factor in making that decision.** Other highly rated reasons included the philosophy of the camp/school, the facilities available at the site and the general location of the venue. The nature of the response to this question demonstrates a wide range of factors determine how and why a parent selects this industry sector for their children. Once again, this offers the industry a key marketing tool that can be utilized in coming years.

Parent are well satisfied with the locations of the camps and schools to which they send their children, 80% being “very satisfied” with the location and 20% were “satisfied.” There were, in fact, no negative comments registered about this aspect of the day camp and private school industry, suggesting their Mid-Island locations are key factors in the value of the facilities.

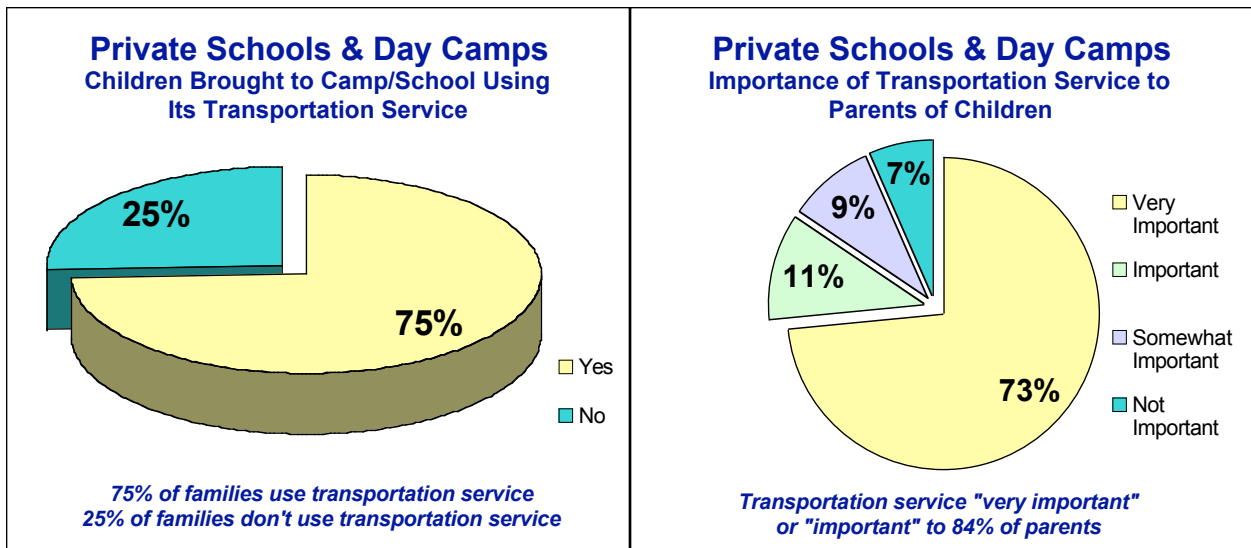


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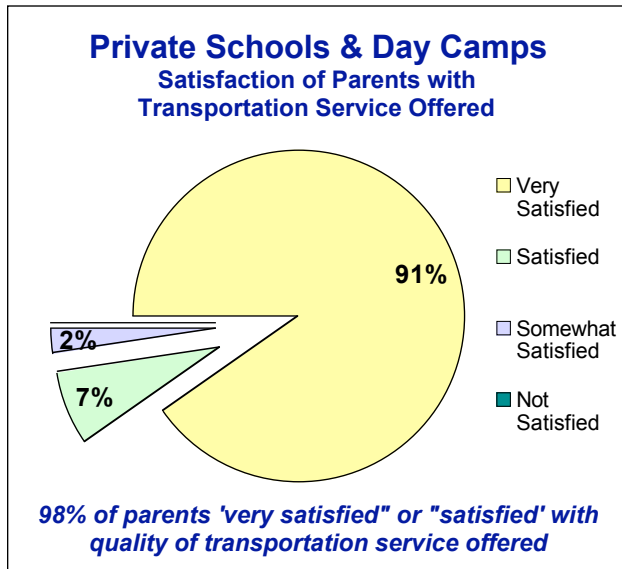
Parents of day campers and private school enrollees are very involved in the activities of these institutions. During the season, 22% of all parents visited their child's camp/school 11+ times, and 63% visited the camp/school 6+ times. Information gathered on the number of family members visiting the camp/school indicates 34% of families sent 3+ members to visit, 75% of families sent 2+ members to visit and 21% sent four or members to the camp. The more often parents visit a camp/school and the more family members that participate, the more likely it is they will be satisfied customers, and that repeat business will occur, as has been the case with this industry over the years.



Family members are also involved as staff, as noted earlier. Data from those parents surveyed indicates 7.8% have volunteered as staff members and 23.5% have served as paid staff at one time or another. This type of participation in camp/school activities also leads to referrals for the camp/school as parents share experiences with friends.



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The transportation provided by Long Island’s day camps and private schools is used by 75% of families and viewed as “very important” or “important” by 84% of parents. It is very significant that 98% of users are “very satisfied” or “satisfied” with this service. The transportation service is critically important for these businesses because it makes it possible for large numbers of children to participate. Without the service, many parents would be unable to send their children to camp or private school. Their positions of employment, the logistics of getting children to camp or school and the cost of providing others of transportation would be prohibitive in most cases.

Transportation is essential for Long Island’s day camps and private schools in providing the youth development services on which they are based.

What parents value most about Long Island’s day camps and private schools is the quality of the care provided to their children. The table on the page following summarizes the comments received, nearly all of which are related to the quality of care. Parents surveyed indicated the staff members employed by day camps and private schools were excellent. Several emphasized the caring employees and their professional nurturing attitude toward the care of campers and participants. The quality of the programs offered and the relationships of staff with children were also cited as reasons for valuing camp and school experiences.

Once again, these results trend very much in the same manner as those of the ACA’s study on *Youth Development Outcomes of the Camp Experience*. That study found that camping experiences helped children build positive identities, develop social skills, increase physical and thinking skills, assist in creating positive values and grow spiritually. Parents used similar words when asked to comment on their families’ camping and private school experiences. They complemented the family nature of operations, the variety of learning and recreational opportunities available, the safe environments provided for their children and the camp and school philosophies. Many remarked that their children especially valued the experiences.

These open-ended comments express many of the intangible values of camps and private schools that can only be measured by the growth of the industry and the high return rates that most of Long Island’s day camps and private schools enjoy. Overall, parents indicate very high levels of satisfaction with their chosen camps and schools. Most importantly, these experiences are common to all parents surveyed, regardless of the camp or school involved. The common factor was simply membership in the Long Island Association of Private Schools and Day Camps, suggesting that adherence to the Association’s standards is its own form of accreditation.

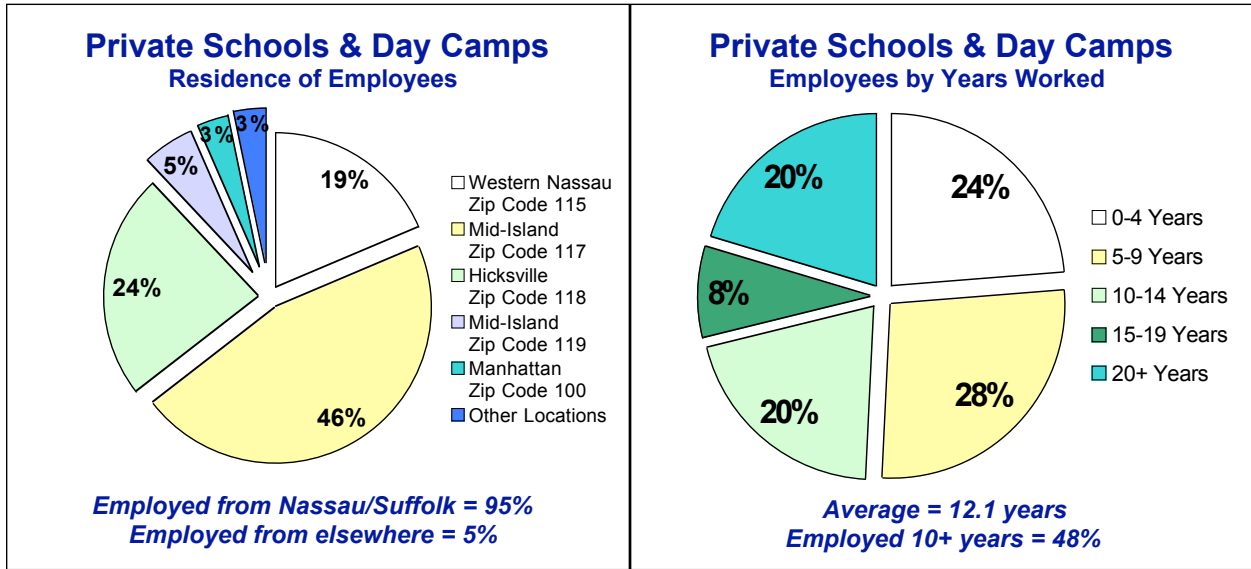
*Long Island Private School and Day Camp Industry
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**Private Schools & Day Camps
What Parents Value Most About the Camp/School**

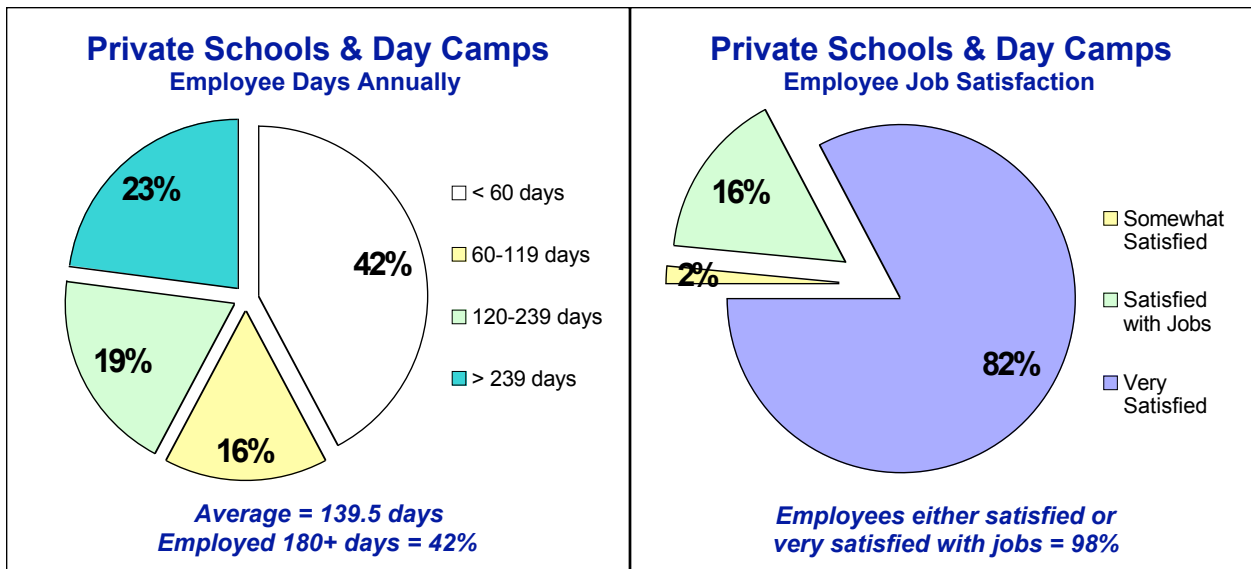
Family run; staff know each child personally
Kids do everything; people/counselors are amazing; safe/caring
Teachers are excellent
Ability to choose special workshops (e.g. build a robot)
Child's safety and happiness
The comfort I feel leaving my small children at school.
Personal relationship we have with staff
Relationship with teacher and care children get with what they learn.
Wonderful staff, owners treat each child as family
The staff is the best!
Experienced staff, leadership and care
Happy, warm camp works hard for positive camp experience
Nurturing, loving, supportive and committed to kids
I value the facilities and activities offered; safety important
Camp philosophy is wonderful; interests of children come first
Trust, to live child; growth, child learns and experiences
Staff takes excellent care of my children
Knowing that child is in safe environment and enjoys going
Professionalism, supervision, safety, caring and warmth
Warm, structured, friendly camp
Caring, nurturing environment.
Quality care each child receives
Staff know their students; activities, high-quality material covered
The nurturing attitude; and the beautiful setting
Caring child's individual needs; cultivating their interests/independence
Personalized attention; physically maintained
Consistency of staff/administration; grounds
Staff nurturing, warm; program is amazing; school academic plus fun
Education program
Quality service, curriculum, high level standards, fun, engaging
Friendly, accommodating staff
Quality of staff, safety and facilities
Teachers
I wish I was young enough to be a camper
Personal attention each child receives from staff
My child is safe, happy and in an extremely nurturing environment
Staff, philosophy excellent
Staff very caring; personally know each child
Care and participation of administration
Experiences my children had there
The staff, organization of programs, extremely accommodating
Staff wonderful, caring, professional
Staff is wonderful, can't say enough about it.
The staff and location
Safety of child; child very happy, having fun
Local camp, child attends 3 days/week summertime
Child enjoys every single day and every activity
Staff, philosophy, programs, devotion to children, safety/happiness.
Son loves it; his choice to continue; has a great experience
The personnel and their philosophy

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Long Island's day camps and private schools provide important job opportunities for residents of Nassau and Suffolk Counties. Surveys of employees indicate 46% live in Mid-Island Zip Code 117 and 94% of all employees reside in Nassau or Suffolk Counties. The average length of employment for employees surveyed was 12.1 years and 48% had been employed 10+ years, with 20% employed 20+ years. The retention of employees by any business is essential. This industry sector reflects a strong willingness by employees to return to their job position at camp or private school.



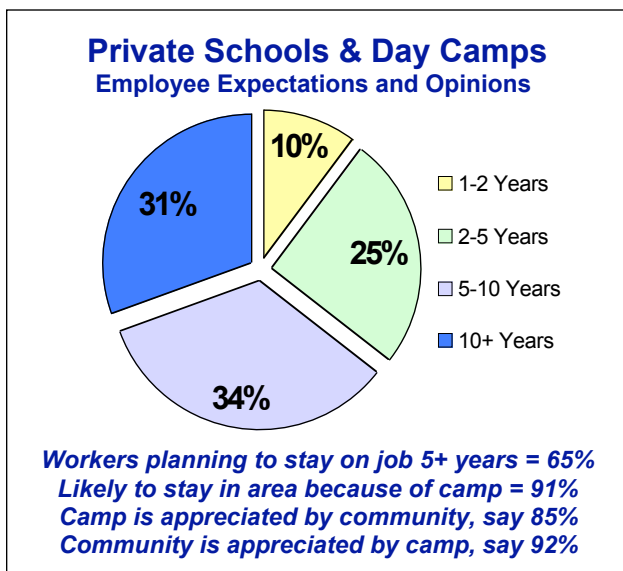
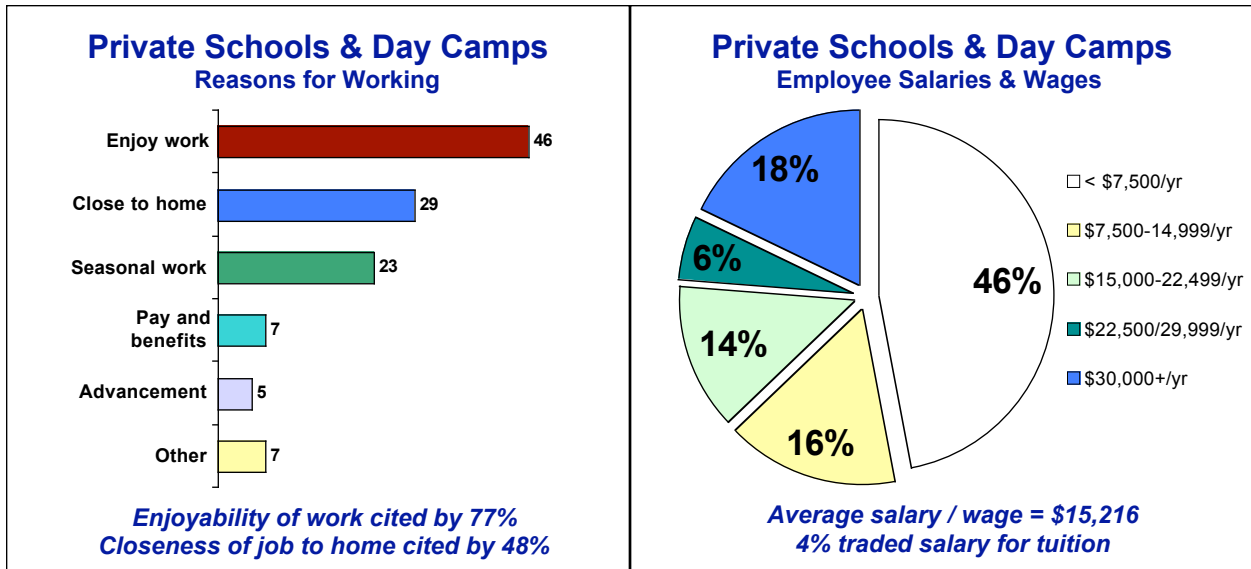
The typical day camp or private school employee works 139.5 days per year with 42% being employed 180+ days. Although the camping industry does not generally produce many year-round jobs, the combination of day camping facilities with private schools, as found among the membership of the Association, does offer several opportunities for longer periods of employment, making the industry very valuable locally.



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Day camp and private school employees are very satisfied with their jobs. Blind surveys of employees indicate 98% of all employees are either “satisfied” or “very satisfied” with their employment. This rather astounding statistic again reflects on the nature of this industry locally and adds to the overall impact the sector has on the local economy and quality of life.

Reasons for working at the facility are also striking. Some 77% cited enjoyability of work as a reason for working at their day camp or private school and 48% cited closeness to home. These businesses demonstrate something known as “employability,” which is related to overall enjoyment of work, and supports the employee retention numbers indicated earlier. Many employees specifically enjoy the seasonal nature of the work, with 23% citing this reason.



Day camp and private school employees earn good wages for their mostly seasonal or part-time work. The average salary is \$15,216. While 46% of employees earn less than \$7,500 per year, this is based upon seasonal work. Some 18% earn \$30,000 or more, and many are in the range between \$7,500 and \$30,000, which is very good for seasonal work.

Employee expectations and opinions were also solicited. Workers planning to stay on the job 5+ years represented 65% of those surveyed. Some 91% say they are likely to stay in the area due to the camp being located there.

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**Private Schools & Day Camps
Employee Observations on Community Contributions**

Camp contributes to local fund raising events
Camp employs local students for summer jobs
Camp offers beauty, youth and class
Camp rented on weekends private functions
Camp works with diabetic children
Campers, parents, staff meet new friends
Charity fund-raisers; food drives
Charitable contributions
Contributes to vitality, stature of community
Contributions to local PTA's, Girl & Boy Scouts
Discounts people who work on the Rt 110 corridor
Employment for Long Island youth
Employment opportunities; money for the town
Employment opportunity
Fully involved with town, schools, fire companies
Fun, safe environment summer for children
Great camp; children love it
Great service to Huntington area
Helps those who can't afford
Jobs for teenagers and college students
Keep kids healthy and social
Local children have a wonderful summer
My child 7th summer here
Offer quality child care to local community
Parents know children are safe and good summer
Place for children to enjoy; have fun
Place for kids to grow, learn, make new friends.
Place of employment
Provides "greenbelt" in residential area
Provides a loving, safe environment - parents work
Provides daycare, taxes, jobs
Quality directors and staff
Quality education, swimming, outdoor activities
Safe environment for children
Scholarships available to needy children.
Strong community support
This camp is needed and well respected
Three generations involved caring of children
Use local businesses (pizza, bowling, skating ,etc.)
Well-known component of surrounding areas
Wonderful outlet to parents; accomodating
Wonderful place to work; kids have amazing summer
Wonderful school/camp and an asset to community
Workshops local high schools, colleges, parents

Moreover, 85% of workers say their camp or school is also appreciated by the entire community and 92% believe the community is likewise appreciated by their camp or school.

These are relatively high percentages and show the extent to which the employees feel positively about their camp or school and its role in the community.

Employees of day camps and private schools see many specific positive impacts on their communities. Employees pointed to camp and school contributions to local fund raising events, classes that benefit community residents, camps that work with diabetic children, green belt advantages of the facilities and much more.

It is specifically suggested that this report, which summarizes many of these comments and observations, be widely distributed as a tool for demonstrating the role day camps and private schools play in meeting the needs of the communities they serve. This story needs to be told and retold many times.

Indeed, the surveys conducted reveal day camps and private schools are much more than a service delivery system for youngsters. These facilities are of significant community and economic development value to the counties of Nassau and Suffolk. Furthermore, they represent a major economic sector within the State of New York when all the camps that exist in the state are added together.

The contributions of day camps and private schools to the quality of life cannot also be neglected. These contributions include: a) the large acreage of recreational land preserved; b) the many types of recreational facilities and services provided, and c) the income, expenditures and taxes paid to support various levels of government (see next

***Long Island Private School and Day Camp Industry
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section). When all these things are considered it is very evident the camps and schools are far more than just private enterprise functions.

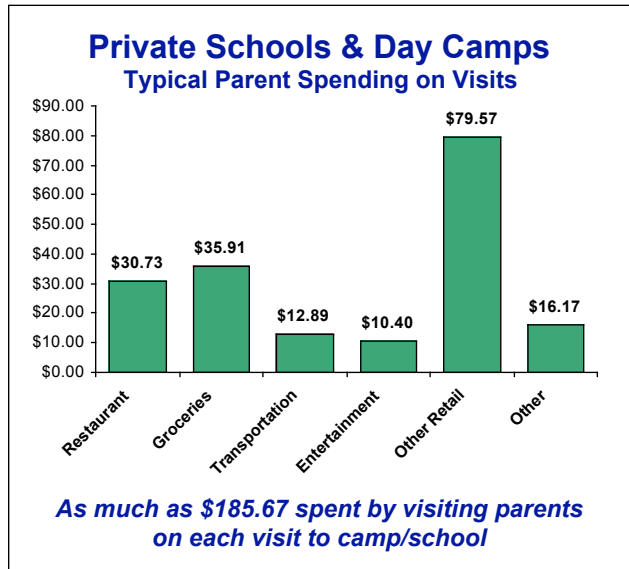
These positive impacts are regenerated each year, year after year. They grow each year in most cases, and have permanent positive effect on the counties that have often been overlooked. The writers of this report have had an opportunity to study the camp industry for several years and believe the day camps and provide schools in Nassau and Suffolk Counties are a niche industry that should be promoted and marketed as major community assets.

**Long Island Private School and Day Camp Industry
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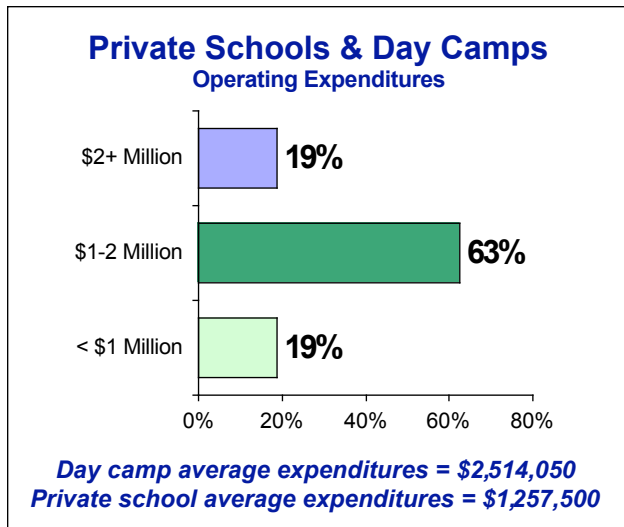
5.0 Contributions of the Industry to the Local Economy

Many survey questions were asked that related directly to the economic impact of the Long Island day camp and private school industry. They reveal a significant economic impact that adds significantly to the overall economy of the two counties, and that can only grow in coming years.

Parents of day campers visit camp often (see previous section) and spend money in the community while doing so. Total parent expenditures on visits are as much as \$185.67 when average expenditures on various items are combined. By far, the highest parent expenditure is for “other retail,” but other major parent expenditure categories include groceries, restaurants, transportation and entertainment.



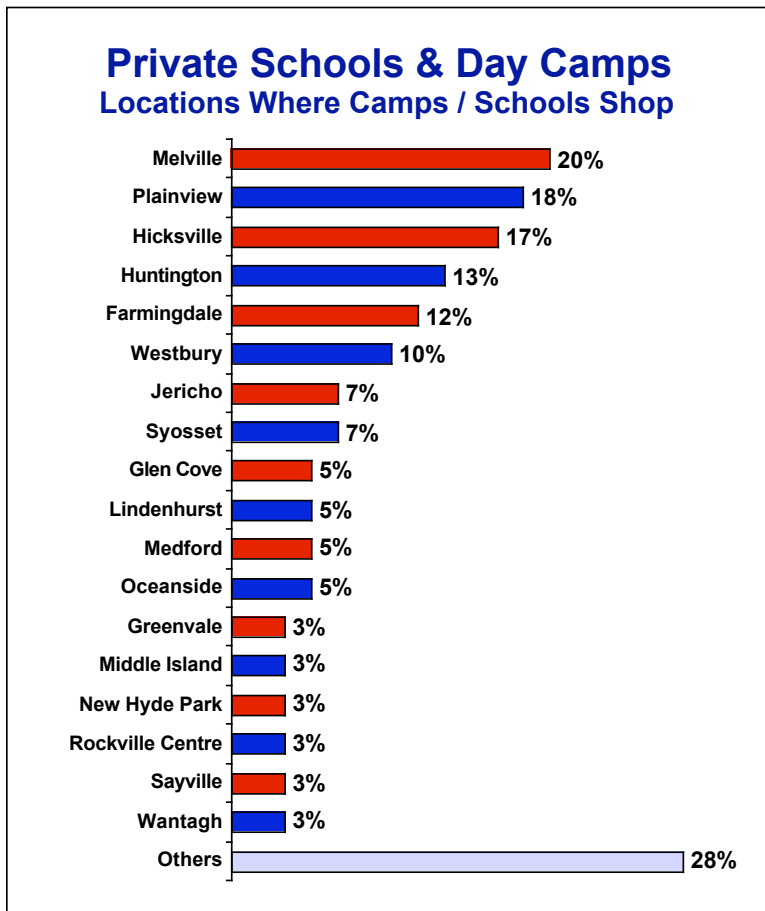
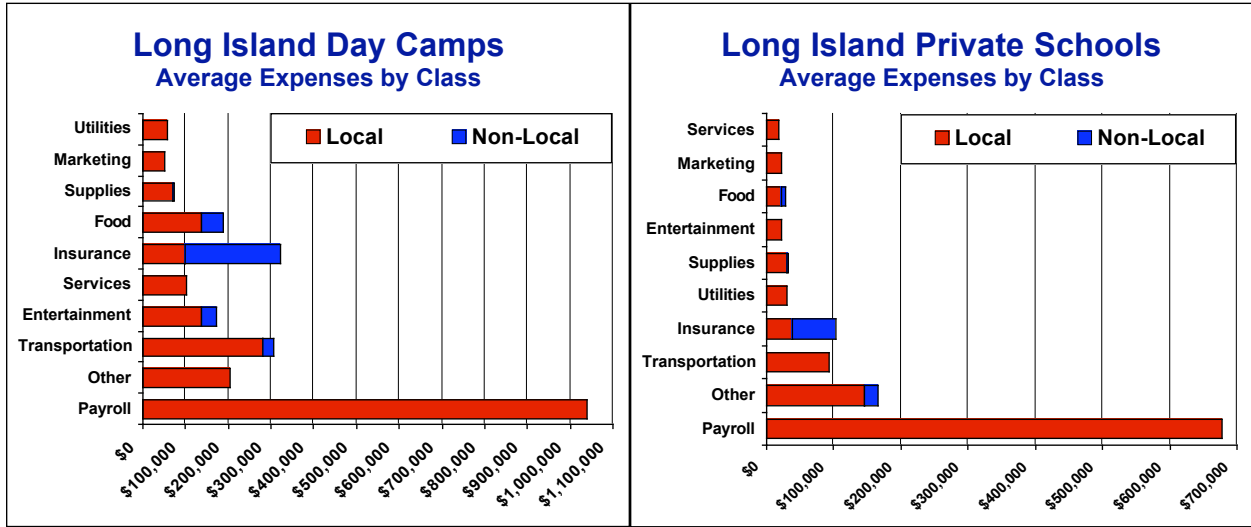
Day camps and private schools are, themselves, major spenders within the communities they serve. Some 63% of all facilities have operating budgets of \$1-2 million. Another 19% spend \$2 million or more annually. The average day camp expenditures are \$2,514,000, while the private school average is \$1,257,500.



Payroll is the top spending category for both day camps and private schools. There are ten spending categories for day camps, ranging from payroll to utilities, marketing, supplies, food and other costs. The average payroll expenditure is \$1,039,500. The next highest average is for transportation while the third highest is “other.” There are six categories where there is some non-local expenditure, and these include insurance, food, transportation, and entertainment. Payroll is also the highest spending category for private schools, with an average of \$677,533 per school. There are four non-local expenditure categories, in part, in this instance. These include insurance, supplies and “other.”

Clearly, the two counties benefit greatly by these business spending patterns. Day camps surveyed indicated they purchased 86% of their needed products and services locally. Private schools surveyed stated that they purchased 92% of such goods and services locally.

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Melville (20%), Plainview (18%) and Hicksville (17%) are the primary shopping areas for day camps and private schools, as the adjoining chart indicates. The likelihood is these numbers will increase in the next few years, especially given the current cost of transportation and the increased capacity these facilities are now offering.

Total local (Nassau and Suffolk Counties) spending by the member facilities of the Long Island Association of Private Schools and Day Camps Day camps and Private Schools is very large. Based on the average spending per facility determined through the surveys (see above), total spending is estimated at \$57,823,150 for the Association's 23 day camp operations and \$18,862,500 for its 15 private school operations, making the Association membership a \$77 million industry based on direct spending alone.

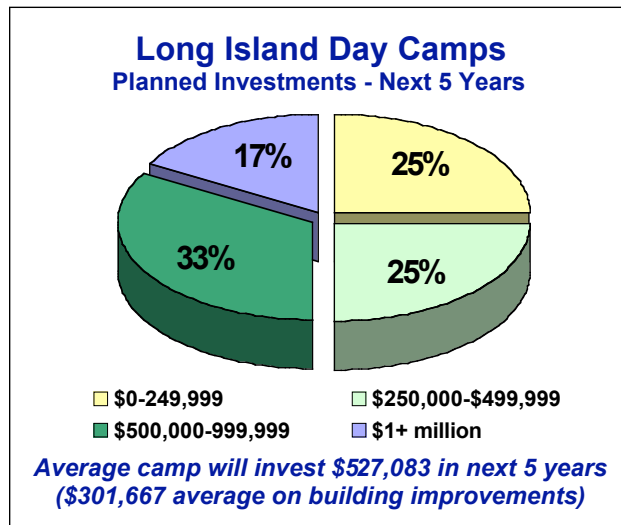
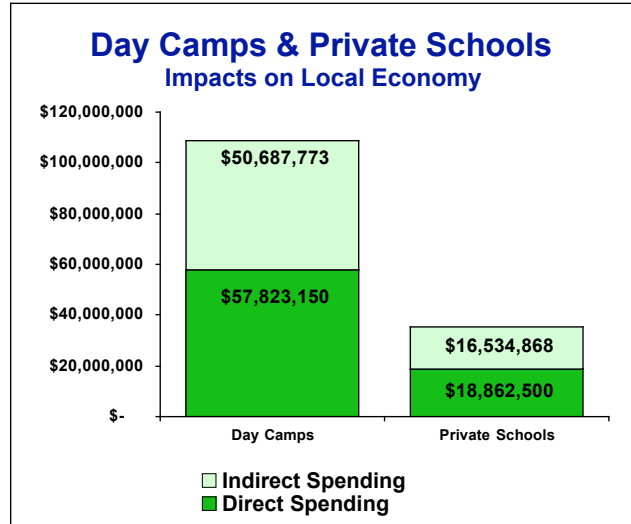
operations and \$18,862,500 for its 15 private school operations, making the Association membership a \$77 million industry based on direct spending alone.

There are substantial multiplier benefits from this spending as it ripples through the local economy. That is to say, a portion of each dollar of camp and school spending locally gets respent locally in a repetitive process until the value of the initial spend-

**Long Island Private School and Day Camp Industry
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ing is exhausted. The cumulative impacts of this spending are measured by economic multipliers. These multipliers have been studied for all industries and all counties in the U.S. by the Department of Commerce, Bureau of Economic Analysis. Their studies of Nassau and Suffolk Counties indicate this industry category generates an economic impact, based on total output, of 1.8766 times initial spending and a total employment impact of 1.5004 times the initial jobs created.

Given these multipliers, the day camp and private school industry is responsible for a \$143.9 million contribution to the Nassau/Suffolk economy. The industry also directly generates an estimated 7,501 full-time, seasonal and part-time jobs based on the averages detailed earlier. It indirectly produces another 3,753 jobs based on the estimated employment multiplier for the industry locally. **This means that day camps and private schools are responsible for a 11,254 total job contribution to the local economy.** Moreover, this does not include the numerous other camps/schools who are not members of the Association. Also, this is an industry with staying power that produces large community and open space benefits for the Long Island communities in which it operates.



Major investments are planned over the next five years by Long Island's day camps and private schools. These dollars generate major construction sector income for the local economy. Among day camps, 33% indicated they would invest \$500,000 to \$999,999 and 17% expected to invest \$1 million or more. The average planned investment is \$527,083 for each camp, with \$301,667 planned for building improvements.

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Among private schools, 50% plan investments of up to \$150,000 with one expecting to invest \$500,000 or more. The average planned investment is \$141,429 with \$90,714 allocated for building improvements. As these investments are made, the recirculation of the monies being spent will also produce major economic multiplier effects within the communities of Nassau and Suffolk Counties.

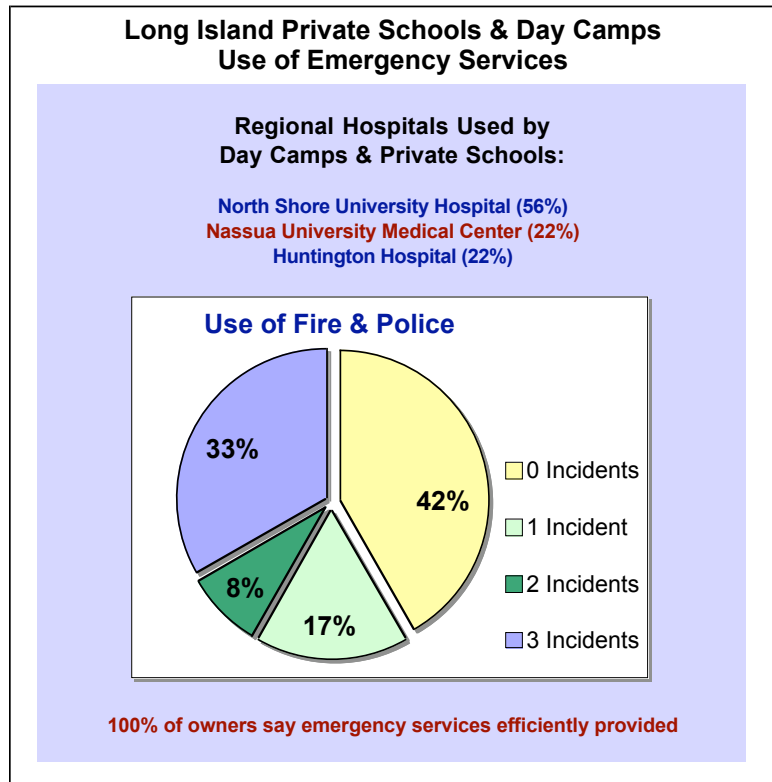


Day camps and private schools offer many special benefits to neighbors and parents. Jobs provided are the most obvious. Others include parking for fire company picnics and discounts of up to 50% for children bordering facilities.

Some 67% of respondents noted that early-care or after-care programs were offered and 25% accommodated sleepovers. Each of these special benefits adds significant value to the day camp and private school experience.

Support and use of emergency services is another factor. Regional hospitals used by day camps and private schools included the North Shore University Hospital, Nassau University Medical Center and Huntington General Hospital.

Fire and police services have been seldom used with 42% of facilities reporting no incidents, 33% reporting three incidents, 8% reporting two incidents and 17% reporting one incident. This suggests camp and school demands for services are minimal in comparison to taxes paid. All camp and school owners thought emergency services were efficiently provided.



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The survey also revealed much about the extent to which the day camps and private schools contribute to the economy in other ways. For example, the average day camp has bank deposits of \$2,830,047, and the private school \$1,212,500 in bank deposits, making them important customers of local financial contributions.

Day camps and private schools make large charitable contributions. The typical day camp provides \$10,365 in cash and \$27,250 in non-cash contributions. The typical private school provides \$3,617 in charitable cash contributions and \$10,000 in non-cash. These voluntary contributions support many other organizations in the community. These donations of time, money and other resources demonstrate not just good will, but specific ways that each day camp and private school serves the community in which it is located.

Long Island's day camps and private schools are major taxpayers. The average camp pays \$45,742 in state sales tax, \$101,336 in school taxes, \$36,873 in county taxes, and \$18,148 in town/village taxes. Private schools pay \$11,540 in sales tax, \$53,485 in school taxes, \$12,400 in county taxes, and \$6,118 in town/village taxes. **Altogether, the members of the Association pay an estimated \$1,223,824 in New York State sales tax and \$4,676,345 in property taxes.** The average camp/school pays \$123,062 in property taxes, based upon Nassau County real property tax records and input received from surveys. Very few other taxpayers provide so much with so little demand on services.

**Long Island Private Schools & Day Camps
Financial Contributions to Community**

Average Local Bank Deposits:

Day camps - \$2,830,047
Private schools - \$1,212,500

Charitable Contributions:

Typical day camp annually contributes \$10,365 in cash to charity
Typical day camp makes \$27,250 annually in non-cash contributions
Typical private school annually contributes \$3,617 in cash to charity
Typical school makes \$10,000 annually in non-cash contributions

Taxes Paid:

Typical day camp pays \$45,742 in State sales taxes
Typical day camp pays \$101,336 in school taxes
Typical day camp pays \$36,873 in county taxes
Typical day camp pays \$18,148 in town/village taxes
Typical private school pays \$11,450 in State sales taxes
Typical private school pays \$53,485 in school taxes
Typical private school pays \$12,408 in county taxes
Typical private school pays \$6,118 in town/village taxes

Jobs Created:

Day camps hire an average of 227 staff for season
Days camps hire an average of another 73 part-time workers
96% of day camp staff are hire locally
Day camp staff salaries average \$24,890 for staff members
Day camp staff salaries average \$4,075 for part-time workers
Employee return rate for day camps averages 67%
Private schools hire an average of 26 staff for season
Private schools hire an average of another 14 part-time workers
100% of private school staff are hire locally
School staff salaries average \$26,063 for staff members
School staff salaries average \$11,333 for part-time workers
Employee return rate for private schools averages 91%

Purchases from Local Suppliers:

36% of day camps participate in vendor fair
Participating day camps purchase 11% of supplies at fair

All of these numbers represent different ways camps and schools contribute to the local economic base. As noted above, these facilities are large job generators. Day camps

**Long Island Private School and Day Camp Industry
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hire an average of 227 jobs with another 73 being part time. Some 96% of all jobs are local, and the average staff salary is \$24,890. The average part time salary is \$4,075. Private schools hire an average of 26 regular staff plus 14 part-time workers, with average salaries of \$26,063 and \$11,333, respectively.

Return rates are high for day camp and private school employees at 67% and 91%, respectively. These are excellent rates indicating high levels of job satisfaction.

Surveys revealed that 36% of all day camps participate in a local vendor fair with the participating day camps purchasing 11% of their supplies at the fair. This amount should grow as the vendor fair becomes more popular among local suppliers of products and services.

Facility capacity and economic impact are, to some extent, a function of the season length. For day camps, the typical length of season is 39 days or 8 weeks, while for schools, the season is typically 180 days or 39 weeks. During the off-season, there are a number of activities identified by the respondents. Some examples include magic shows, game shows, camp reunions, service club events, and parent breakfasts and carnivals.

**Long Island Private Schools & Day Camps
Operational Characteristics**

Typical Length of Season:

Day camps - 8 weeks (39 days)
Private schools - 39 weeks (180 days)

Typical Off-Season Activities:

Magic show / game show
Camp reunion
Service club events
Parent breakfast and carnival
Halloween Spooktacular
Spring carnival
Staff reunion
Open house
Fall fair
Concerts
Bake sale
Book fair

Use of Facilities and Services:

Typical day camp used by 805 children
Typical day camp transports 720 or 89% of children
Typical day camp operates 55 buses or vans
Typical private school used by 182 children
Typical private school transports 139 or 76% of children
Typical private school operates 14 buses or vans

Rates and Scholarships:

Day camps charged an average of \$4,460 per child per season
Day camps charged an average of \$2,794 per child per month
Day camps give an average of 9.5 scholarships annually
Total scholarships average \$24,557 per camp annually
59% of camp scholarships go to towns where camps located
Private schools charged an average of \$9,968 per child per season
Private schools charged an average of \$1,533 per child per month
Private schools give an average of 5 scholarships annually
Total scholarships average \$8,000 per school annually

Altogether, the Long Island Association of Private Schools and Day Camps serves an estimated 18,515 children, of which 16,200 go to day camps and 2,730 to private schools. Camps serve an average of 805 children with 720 being transported or 89% of the total. For private schools, the average is 182 children, with 139 transported or 76% of the total. The camps use an average of 55 buses or vans and the schools use 14 buses or vans. Transportation costs have been identified elsewhere and are important contributors to the economic importance of these facilities.

***Long Island Private School and Day Camp Industry
Study of Economic Impacts on Nassau and Suffolk Counties***

Camp and school scholarships represent still another economic contribution. For camps, the average fee is \$4,460 per child per season, while the average per month is \$2,794. For private schools, the average for the season is \$9,968 while the monthly average is \$1,533. Day camps provide an average of 9.5 scholarships annually at an average combined value of \$24,557. For private schools, the number provided was 5 scholarships, which represented \$8,000 in combined value. These scholarships ensure that day camps and schools are serving all segments of the communities in which they are located.

***Long Island Private School and Day Camp Industry
Study of Economic Impacts on Nassau and Suffolk Counties***

6.0 Recommendations

This study revealed many features of Long Island's day camp and private school industry that have not been highlighted in the past. Making the best use of this information to get the positive message out suggests the following, which are offered as consultant recommendations:

1. Few persons or organizations understand or have knowledge regarding the extent to which the day camp and private school industry has flourished and developed in Nassau and Suffolk Counties. The Association should, to change this situation, develop a marketing and promotion program, utilizing the results of this report, and heavily publicize this information. The media should be contacted and presented information about the study's conclusions. Editorial board meetings with the local media should be held to alert them to the benefits and assets that the camps and schools provide to the communities and counties served.
2. This study should be made available on the Association's web site in a Portable Data Format (PDF) format using a separate "Media" page. This page should be updated periodically with additional information regarding the contributions of the industry to the overall economy.
3. A series of meetings should be held with key governmental officials at all levels of government, informing them of the results of the study and encouraging their use of this information as needed.
4. Local chambers of commerce should be contacted and requested to publish the major results of this study and encouraged to have speakers representing the Association speak to the Chamber Boards or members, as appropriate.
5. State legislators should be contacted regarding the importance of this industry sector, the results of this study and ways the study results can be used to support legislation of benefit to the industry (e.g. laws regarding camp and school bus driver requirements).
6. Development of a brochure that summarizes the study results would be helpful as a tool to maximize the critical importance of the camps and schools and transmitted to appropriate organizations and agencies. This brochure need not be flashy. It might include no more than the summary of findings with some select graphs.
7. It is evident the general public and others do not recognize how much the facilities contribute to the tax base. Therefore, a special effort should be undertaken to develop a series of news releases and other informational techniques that highlight these facts along with some of the other factual information that tells the story of the camp and day school industry.

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8. The role of day camps and private schools in assisting communities has been documented in this report. Even more sharing of such facilities would enhance their image and role and would be an initiative that could help market the true dimensions of what the camps and schools provide to the communities and counties.

APPENDIX 1

Association Membership

Long Island Association of Private Schools and Day Camps

1. Big Chief Day Camp - East Meadow, NY 11554
2. Brookhaven Country Day Camp - Yaphank, NY 11980
3. Camp DeBaun - Oceanside, NY 11572
4. Carousel Day School - Hicksville, NY 11801
5. Crestwood Country Day School - Melville, NY 11747
6. Driftwood Day Camp - Melville, NY 11747
7. Greentrees Day Camp - Syosset, NY 11791
8. Ivy League Day Camp - Smithtown, NY 11787
9. Kenwal Day Camp - Melville, NY 11747
10. Maplewood School & Summer Program - Wantagh, NY 11793
11. Mark Country Day School & Camp - Bay Shore, NY 11706
12. Merrick Woods Country Day School - Merrick, NY 11566
13. Miss Sue's Nursery School - Plainview, NY 11803
14. North Shore Day Camp - Glen Cove, NY 11542
15. Park Shore Country Day Camp & School - Dix Hills, NY 11746
16. Pierce Country Day Camp & School - Roslyn, NY 11576
17. Red Robin Country Day School & Camp - Westbury, NY 11590
18. Robin Hood Country Day School - Greenvale, NY 11548
19. Shibley Summer Day Camp - Roslyn, NY 11576
20. South Shore Country Day School & Camp - North Bellmore, NY 11710
21. Thomas School Day Camp - Melville, NY 11747
22. Twin Oaks Day Camp - Freeport, NY 11520
23. West Hills Day Camp - Huntington, NY 11743

APPENDIX 2

Survey Forms

**LONG ISLAND ASSOCIATION OF PRIVATE SCHOOLS AND DAY CAMPS
CAMP SURVEY**

1) Name of camp: _____

2) Address: _____

3) Web address: _____ E-Mail: _____

4) Contact person: _____ Phone/Fax: _____ / _____

5) Town and County where camp is located: _____

6) How long has your camp been in existence? _____ Years

7) Total land owned by camp: _____ Acres
Land in direct use for operation of camp: _____ Acres

8) What is the total daily capacity of your camp in the summer? _____ Campers

9) What recreational facilities do you maintain? (PLEASE CHECK ALL THAT APPLY)

<input type="checkbox"/> Arcade	<input type="checkbox"/> Tennis	<input type="checkbox"/> Hiking trails
<input type="checkbox"/> Ball fields	<input type="checkbox"/> Handball	<input type="checkbox"/> Bicycling
<input type="checkbox"/> Basketball	<input type="checkbox"/> Playground	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Pool(s)	<input type="checkbox"/> Pond/lake	<input type="checkbox"/> Other: _____

10) What is your market area? < 10 miles 10-20 Miles 20+ Miles

11) What were your total camp operating expenses in 2004? \$ _____

12) How much new capital do you expect to invest in camp improvements and upgrades over the next 5 years? \$ _____

13) How much of this will be spent on building improvements? \$ _____

14) Please estimate your annual spending in the following categories (Local = Nassau/Suffolk):

Food supplies	LOCAL	\$ _____	NON-LOCAL	\$ _____
Transportation of children/gasoline/buses		\$ _____		\$ _____
Insurance		\$ _____		\$ _____
Advertising/marketing		\$ _____		\$ _____
Payroll and related expenses		\$ _____		\$ _____
Entertainment (shows, trips, etc.)		\$ _____		\$ _____
Other supplies (sporting goods, t-shirts)		\$ _____		\$ _____
Utilities (phone, electric, water, etc.)		\$ _____		\$ _____
Services (e.g. laundry, electricians, etc.)		\$ _____		\$ _____
Other: _____		\$ _____		\$ _____

**LONG ISLAND ASSOCIATION OF PRIVATE SCHOOLS AND DAY CAMPS
CAMP SURVEY**

15) Do you provide either early care or after care services? Yes No

Do you accommodate sleepovers? Yes No

What benefits or incentives, if any, do you provide for neighbors of your facility?

16) Where do you go for emergency health services? (e.g. local hospital)

How often did you use local police or fire protection services in 2004? Never Once
 2X 3X+

Were they efficient in meeting your needs? Yes No

17) Does your camp have any bank deposits in Nassau/Suffolk County? Yes No
If yes, what was the total amount for 2004?
\$ _____

18) Does your camp have any mortgage accounts in a Nassau/Suffolk County bank? Yes No
If yes, what was the total amount for 2004?
\$ _____

19) Total charitable cash contributions your organization made in 2004 to Nassau/Suffolk County groups (e.g. fire company, hospital, United Way)? \$ _____

Charitable non-cash contributions your organization made in 2004 to Nassau/Suffolk County groups (e.g. value of donated use of facilities)? \$ _____

20) Please estimate the taxes paid by your organization to the following for the year 2004:

New York State Sales Tax:	\$ _____
Property Taxes - School District:	\$ _____
Property Taxes - County:	\$ _____
Property Taxes - Town/Village:	\$ _____

21) How many on-site employees does your camp have during the summer: Full-time: _____
Part-time: _____

What % of your employees lives within Nassau/Suffolk ? _____ %

**LONG ISLAND ASSOCIATION OF PRIVATE SCHOOLS AND DAY CAMPS
CAMP SURVEY**

22) What is the average salary for your full-time workers? \$ _____
 What is the average part-time worker paid for a season? \$ _____
 What is your typical employee return rate? _____ %

23) Does your organization participate in the vendor fair? _____
 What % of your supplies/services are purchased this way? _____ %

24) What date does your camp typically open? _____
 What date does your camp typically close? _____

What off-season camp events do you conduct, if any? Please be specific. Day school activities, if any, should be reported separately on the day school form.

25) How many riders do you transport to camp on buses or vans? _____ How many buses/vans do you operate? _____

26) Number of participants during the 2004 season: _____
 Length of season (number of days or weeks) _____ days _____ weeks

27) Camp program fees for 2004 year: Entire season: _____
 Month's stay: _____
 Week's stay: _____
 Other stay (describe): _____

28) If your camp was used for other purposes than camping or day school (e.g. banquets, conferences, meetings, etc.), please estimate this use for 2004.
 Estimated number of persons attending events: _____
 Camp revenue derived from these types of uses: \$ _____

29) How many scholarships do you typically offer each year? _____
 What was the total value of scholarships you gave in 2004? \$ _____
 How many of those assisted come from the Town where you are located? _____

30) What is the age breakdown of the children you serve under your camp program?

< 6 years	_____ %	9-10 years	_____ %	13-14 years	_____ %
6-8 years	_____ %	11-12 years	_____ %	15+ years	_____ %

31) How often do parents typically visit : _____ How many parents serve as volunteer staff? _____ How many parents serve as paid staff? _____

<input type="checkbox"/> Daily	<input type="checkbox"/> Weekly		
<input type="checkbox"/> Every 2-3 days	<input type="checkbox"/> Monthly		

**LONG ISLAND ASSOCIATION OF PRIVATE SCHOOLS AND DAY CAMPS
CAMP SURVEY**

32) What types of attractions do you visit during the season with your campers?

<input type="checkbox"/>	Broadway shows	<input type="checkbox"/>	Amusement parks	<input type="checkbox"/>	Museums
<input type="checkbox"/>	Zoos	<input type="checkbox"/>	Concerts	<input type="checkbox"/>	Other: _____
<input type="checkbox"/>	Baseball games	<input type="checkbox"/>	Beaches	<input type="checkbox"/>	Other: _____

33) What % of the above activities are located in Nassua/Suffolk Counties? _____ %

34) What is your typical camper return rate on an annual basis? _____ %

35) Have your registrations generally been up or down over the last 5 years? _____

Please indicate your expectations for registrations over the next 5 years:

<input type="checkbox"/>	Expect a decline
<input type="checkbox"/>	Expect registration to stay about the same
<input type="checkbox"/>	Expect a total increase of 0 - 5% over 2004
<input type="checkbox"/>	Expect a total increase of 5 - 10% over 2004
<input type="checkbox"/>	Expect a total increase of more than 10% over 2004

36) Please provide as much additional information as possible relative to your economic impact that may not have been covered by the above questions.

37) Offer any general comments or observations relative to your camp that you feel might be helpful to the consultants:

38) Please offer any ideas or suggestions for this study or ideas and suggestions for local officials and others regarding your industry.

**LONG ISLAND ASSOCIATION OF PRIVATE SCHOOLS AND DAY CAMPS
DAY SCHOOL SURVEY**

1) Name of day school: _____

2) Address: _____

3) Web address: _____ E-Mail: _____

4) Contact person: _____ Phone/Fax: _____ / _____

5) Town and County where day school is located: _____

6) How long has your day school been in existence? _____ Years

7) Total land owned by day school independent of your camp (if any): _____ Acres
Land in direct use for operation of day school, as compared to camp: _____ Acres

8) What is the daily capacity of your school? Summer Winter

9) What recreational facilities do you maintain? (PLEASE CHECK ALL THAT APPLY)

<input type="checkbox"/> Arcade	<input type="checkbox"/> Tennis	<input type="checkbox"/> Hiking trails
<input type="checkbox"/> Ball fields	<input type="checkbox"/> Handball	<input type="checkbox"/> Bicycling
<input type="checkbox"/> Basketball	<input type="checkbox"/> Playground	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Pool(s)	<input type="checkbox"/> Pond/lake	<input type="checkbox"/> Other: _____

10) What is your market area? < 10 miles 10-20 Miles 20+ Miles

11) What were your total day school operating expenses in 2004? \$ _____

12) How much new capital do you expect to invest in day school improvements and upgrades over the next 5 years? \$ _____

13) How much of this will be spent on building improvements? \$ _____

14) Please estimate your annual spending in the following categories (Local = Nassau/Suffolk):

Food supplies	LOCAL	\$ _____	NON-LOCAL	\$ _____
Transportation of children/gasoline/buses		\$ _____		\$ _____
Insurance		\$ _____		\$ _____
Advertising/marketing		\$ _____		\$ _____
Payroll and related expenses		\$ _____		\$ _____
Entertainment (shows, trips, etc.)		\$ _____		\$ _____
Other supplies (sporting goods, t-shirts)		\$ _____		\$ _____
Utilities (phone, electric, water, etc.)		\$ _____		\$ _____
Services (e.g. laundry, electricians, etc.)		\$ _____		\$ _____
Other: _____		\$ _____		\$ _____

**LONG ISLAND ASSOCIATION OF PRIVATE SCHOOLS AND DAY CAMPS
DAY SCHOOL SURVEY**

15) Do you provide either early care or after care services? Yes No

Do you accommodate sleepovers? Yes No

What benefits or incentives, if any, do you provide for neighbors of your facility?

16) Where do you go for emergency health services? (e.g. local hospital)

How often did you use local police or fire protection services in 2004? Never Once
 2X 3X+

Were they efficient in meeting your needs? Yes No

17) Does your day school have any bank deposits (separate from your camp) in Nassau/Suffolk? Yes No
If yes, what was the total amount for 2004?
\$ _____

18) Does your day school have any mortgages (separate from your camp) at a Nassau/Suffolk bank? Yes No
If yes, what was the total amount for 2004?
\$ _____

19) Total charitable cash contributions your day school made in 2004, if any, independent of your camp contributions, to Nassau/Suffolk groups: (e.g. fire company, hospital, United Way)? \$ _____

Charitable non-cash contributions your day school made in 2004, if any, independent of your camp contributions, to Nassau/Suffolk groups: (e.g. value of donated use of facilities)? \$ _____

20) Please estimate any **additional** taxes paid by your day school, if any, to the following for the year 2004:

	New York State Sales Tax:	\$ _____
	Property Taxes - School District:	\$ _____
	Property Taxes - County:	\$ _____
	Property Taxes - Town/Village:	\$ _____

21) How many on-site day school employees does your organization have: Full-time: _____
Part-time: _____

What % of your employees lives within Nassau/Suffolk ? _____ %

**LONG ISLAND ASSOCIATION OF PRIVATE SCHOOLS AND DAY CAMPS
DAY SCHOOL SURVEY**

22) What is the average salary for full-time day school workers? \$ _____
 What is the average part-time day school worker paid? \$ _____
 What is your typical day school employee return rate? _____%

23) Does your day school participate in the vendor fair? _____
 What % of your supplies/services are purchased this way? _____%

24) Does your day school operate year round? Yes No
 If not, what date does your day school typically open? _____
 If not, what date does your day school typically close? _____

What off-season day school events, if any, do you conduct (please be specific)?

25) How many riders do you transport to day school on buses or vans? _____ How many buses/vans do you operate? _____

26) Number of participants during the 2004 season: _____
 Length of season (number of days or weeks) _____ days _____ weeks

27) Day school program fees for 2004 year: Annual: _____
 Monthly: _____
 Weekly: _____
 Other stay (describe): _____

28) If your day school facilities were used for other purposes than day school (e.g. banquets, conferences, meetings, etc.), please estimate this use for 2004.
 Estimated number of persons attending events: _____
 Day school revenue derived from these types of uses: \$ _____

29) How many scholarships do you typically offer each year? _____
 What was the total value of scholarships you gave in 2004? \$ _____
 How many of those assisted come from the Town where you are located? _____

30) What is the age breakdown of the children you serve with the day school?

< 3 years	_____ %	5-6 years	_____ %	9-10 years	_____ %
3-4 years	_____ %	7-8 years	_____ %	10+ years	_____ %

31) How often do parents typically visit : Daily Weekly
 Every 2-3 days Monthly
 How many parents serve as volunteer staff? _____
 How many parents serve as paid staff? _____

**LONG ISLAND ASSOCIATION OF PRIVATE SCHOOLS AND DAY CAMPS
DAY SCHOOL SURVEY**

32) What types of attractions do you visit during the season with your day school participants?

<input type="checkbox"/>	Broadway shows	<input type="checkbox"/>	Amusement parks	<input type="checkbox"/>	Museums
<input type="checkbox"/>	Zoos	<input type="checkbox"/>	Concerts	<input type="checkbox"/>	Other: _____
<input type="checkbox"/>	Baseball games	<input type="checkbox"/>	Beaches	<input type="checkbox"/>	Other: _____

33) What % of the above activities are located in Nassua/Suffolk Counties? _____ %

34) What is your typical participant return rate on an annual basis? _____ %

35) Have your registrations generally been up or down over the last 5 years? _____

Please indicate your expectations for registrations over the next 5 years:

<input type="checkbox"/>	Expect a decline
<input type="checkbox"/>	Expect registration to stay about the same
<input type="checkbox"/>	Expect a total increase of 0 - 5% over 2004
<input type="checkbox"/>	Expect a total increase of 5 - 10% over 2004
<input type="checkbox"/>	Expect a total increase of more than 10% over 2004

36) Please provide as much additional information as possible relative to your economic impact that may not have been covered by the above questions.

37) Offer any general comments or observations relative to your day school that you feel might be helpful to the consultants:

38) Please offer any ideas or suggestions for this study or ideas and suggestions for local officials and others regarding your industry.

**LONG ISLAND ASSOCIATION OF PRIVATE SCHOOLS AND DAY CAMPS
PARENT SURVEY**

1) Name of camp / day school: _____

2) Your city of residence: _____ Your Zip Code: _____

3) No. of children you had at this camp / day school in 2004: _____
 No. of children you've sent to this camp / day school over the years: _____

4) Please rate your overall level of satisfaction with this camp / day school:

<input type="checkbox"/>	Excellent	<input type="checkbox"/>	Fair
<input type="checkbox"/>	Good	<input type="checkbox"/>	Poor

5) Please tell us why you chose this camp / day school for your children? (CHECK TOP TWO)

<input type="checkbox"/> Quality of location	<input type="checkbox"/> Value of package
<input type="checkbox"/> Quality of facilities	<input type="checkbox"/> Overall camp philosophy
<input type="checkbox"/> Quality of programs	<input type="checkbox"/> Other: _____

6) How satisfied were you with the area where this camp / day school is located?

<input type="checkbox"/> Very satisfied	<input type="checkbox"/> Somewhat satisfied
<input type="checkbox"/> Satisfied	<input type="checkbox"/> Not satisfied

7) How many times did you visit the camp/day school in 2004? _____
 How many of your family typically came to visit? _____
 Do you ever volunteer as an unpaid staff member? _____
 Have you ever worked for the camp / day school as paid staff? _____

8) Please estimate your typical DAILY expenditures in the local area when you visit the camp or day school (consider local to be the Town where the facility is located):

Restaurant	\$ _____
Food/grocery	\$ _____
Transportation	\$ _____
Entertainment	\$ _____
Other retail expenditures	\$ _____
Other: _____	\$ _____

9) Please tell us what you value most about this camp or day school.

10) Are your children transported to camp or day school using its transportation service?	If so, how important is this transportation service to you?	How satisfied are you with the quality of this service?
<input type="checkbox"/> Yes	<input type="checkbox"/> Very important	<input type="checkbox"/> Very satisfied
<input type="checkbox"/> No	<input type="checkbox"/> Important	<input type="checkbox"/> Satisfied
	<input type="checkbox"/> Somewhat important	<input type="checkbox"/> Somewhat satisfied
	<input type="checkbox"/> Not important	<input type="checkbox"/> Not satisfied

**LONG ISLAND ASSOCIATION OF PRIVATE SCHOOLS AND DAY CAMPS
EMPLOYEE SURVEY**

1) Name of camp / day school: _____

2) Your city of residence: _____ Your Zip Code: _____

3) No. of years you have worked at this camp / day school: _____
 No. of days you worked at this camp / day school in 2004: _____

4) How satisfied were you with your at job this camp / day school? Very satisfied Somewhat satisfied
 Satisfied Not satisfied

5) Please tell us why you chose to work at this camp day school? (CHECK TOP TWO)

<input type="checkbox"/> Closeness of job to home	<input type="checkbox"/> Seasonal nature of work
<input type="checkbox"/> Enjoyability of the work	<input type="checkbox"/> Opportunity for advancement
<input type="checkbox"/> Level of pay and benefits	<input type="checkbox"/> Other: _____

6) How much did you earn in salary or wages from this camp / day school in 2004? \$ _____

7) How long do you expect to continue to work at this camp / day school? 1-2 Years 5-10 Years
 2-5 Years 10+ Years

8) Has working at this camp / day school made you more or less likely to stay in this area? More likely Less likely

9) Do you feel that the value of this camp / day school is fully appreciated by the community? Yes No

10) Do you feel that the community is fully appreciated by the camp / day school? Yes No

11) Do you make local purchases for the camp day school? Yes No

Please tell us, by city/town and in order of importance, where most of those purchases are made:
 (e.g. Melville, Hicksville, Lindenhurst)

1) _____
 2) _____
 3) _____

12) If you are a driver, do you reside locally?	If not, do you use temporary lodging in the area?	How long before camp/school opening do you arrive?
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="checkbox"/> Less than 1 week
<input type="checkbox"/> No	<input type="checkbox"/> No	<input type="checkbox"/> More than 1 week

13) Please tell us any other important contributions this camp / day school makes to the area: _____
