

EVERY VOICE COUNTS

JEWISH
ROCHESTER'S
2019 REGIONAL
SURVEY

THE JCC'S LAND USE OPPORTUNITY ASSESSMENT

Prepared by:

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Rochester Research Group

Prepared for:

Jewish Federation of Greater Rochester

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Max and Marian Farash Charitable Foundation

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**“Every Voice Counts” was designed, fielded, and analyzed by
Jocelyn Goldberg-Schaible (Rochester Research Group)
in collaboration and partnership with
Janet Sunkin (Survey Coordinator) and Judy Azoff (Survey Committee Chair)**



Jocelyn Goldberg-Schaible
Rochester Research Group



Janet Sunkin
Survey Coordinator



Judy Azoff
Survey Committee Chair

*“This project was truly a labor of love from the three of us to the Jewish community we love. Although none of us were born or raised here, it is the community that became our home . . . where each of us have lived, raised our children, worked professionally, and volunteered for the past 40 years.” -- **Judy, Janet & Jocelyn***

Survey data tells us stories.

With a sample comprised of

{
2,395 Jewish adult participants
208 Jewish teen participants
350 Non-Jewish participants

here's what we learned about
our participants' preferences & priorities
related to the JCC's various land use opportunities
from these three perspectives.

How the survey introduced the topic:

The JCC recently purchased 105 acres of land (formally the Farash Homestead) directly adjacent to the Edgewood Campus, expanding the JCC's footprint to over 125 acres along the Erie Canal. The JCC has begun to identify a wide range of potential uses for that land, now in its natural state.

The expansion has many possibilities, with potentially huge impact on our entire Jewish community. The JCC's new leadership team has undertaken a collaborative process to re-imagine our JCC as it could potentially become tomorrow.

Looking to the future, the JCC is seeking your input and advice.

Described briefly below are some of the ideas now being explored.

Please rate your reaction to each of these concepts as a potentially great, good, fair, or poor idea for our community.

[Once all had been rated individually, respondents were asked:]

And of all these ideas, which were your favorites? Please choose up to 6.

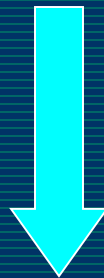
23 potential land use opportunities

were each very briefly described in concept:

- **Outdoor Pool** open to JCC members for free swim, lounging, birthday parties, day camp, and enrichment programs for youth and adults.
- **Indoor Athletic Complex** with multi-purpose courts and fields for team sports, leagues, and practices.
- **Outdoor multi-purpose athletic fields** for team sports, leagues, and practices
- **Ice skating rink** for open skating, hockey, and ice skating classes
- **Performing & Fine Arts Center** for enrichment classes including song, dance, music, writing, and arts & crafts
- **Outdoor amphitheater** for performances and concerts
- **Jewish Rochester Museum** that tells the story of our community's past
- **Art Park** that features local artists' work
- **Community Garden** with flowers and vegetation that is tended by members or the community
- **Community Greenhouse** tended by the community, growing plants and vegetation throughout the year
- **Community Farm** with barn and petting zoo
- **Retreat Center** with lodges and cabins for all forms of community and corporate gatherings
- **Conference Center / Event Center** for all forms of community and corporate gatherings
- **"Moishe House"** type Jewish communal living and gathering space for graduates & post-graduates in their 20s
- **Jewish Community Campus** where several Jewish agencies and services could be co-located
- **Kosher Kitchen** for use by the entire community for events and cooking classes
- **Nature Trail System** for walking, running and biking
- **High Ropes Course** for use by members and corporate outings
- **Boat House** on the canal for paddle boarding, kayaking, and crew
- **Canal Side Café** serving dining and ice cream to members and pedestrians on the canal path
- **Day Camp** with pavilions, fire pit, pond for nature activities
- **Camping grounds** for use by the public, including camping sites and fire pits
- **Town houses** situated along the Erie Canal with access to the canal path and nature park

THE JEWISH ADULT PERSPECTIVE

The question on the following slide determined which of our Jewish Adult participants would be asked the JCC's land use questions, and who would skip those questions.



Our next set of questions is about the Louis S. Wolk JCC of Greater Rochester (which we'll just refer to here as the JCC).

Which of the following describe you? [Please choose all that apply:]

- A. I am currently a **dues-paying JCC member**. [478]
- B. I'm a JCC member through **Silver Sneakers** or other health care benefit program. [358]
- C. **I attended Camp** Sisol and/or Camp Seneca Lake as a camper and/or staff member. [272]
- D. I have **sent my child(ren)** to the JCC's summer **camp(s)**. [663]
- E. I have **sent my child(ren)** to the JCC's **children's programming** [eg. Wolk Children's Center, Geshur After School Care, vacation programming, classes, teams, leagues, etc. [430]
- F. I'm not a dues-paying JCC member, but I've **attended** some of their **programs and/or events** [eg. CenterStage productions, Jewish Book Festival, Jewish Film Festival, classes, lectures, etc.] [515]
- G. I used to be a dues-paying JCC **member in the past**, but am not a member currently [413]



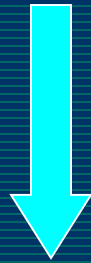
A-G asked land use questions

H&I skipped land use questions

H. I never was a dues-paying JCC member, and have never attended any of their programs and/or events. [64]

I. I've never even been to Rochester's JCC. [31]

THE JEWISH ADULT PERSPECTIVE



N=1,565 Jewish Adults Connected to the JCC
(unique individuals)

770 of them Current Members (incl. Silver Sneakers members)

673 of them Former Members and Program Participants

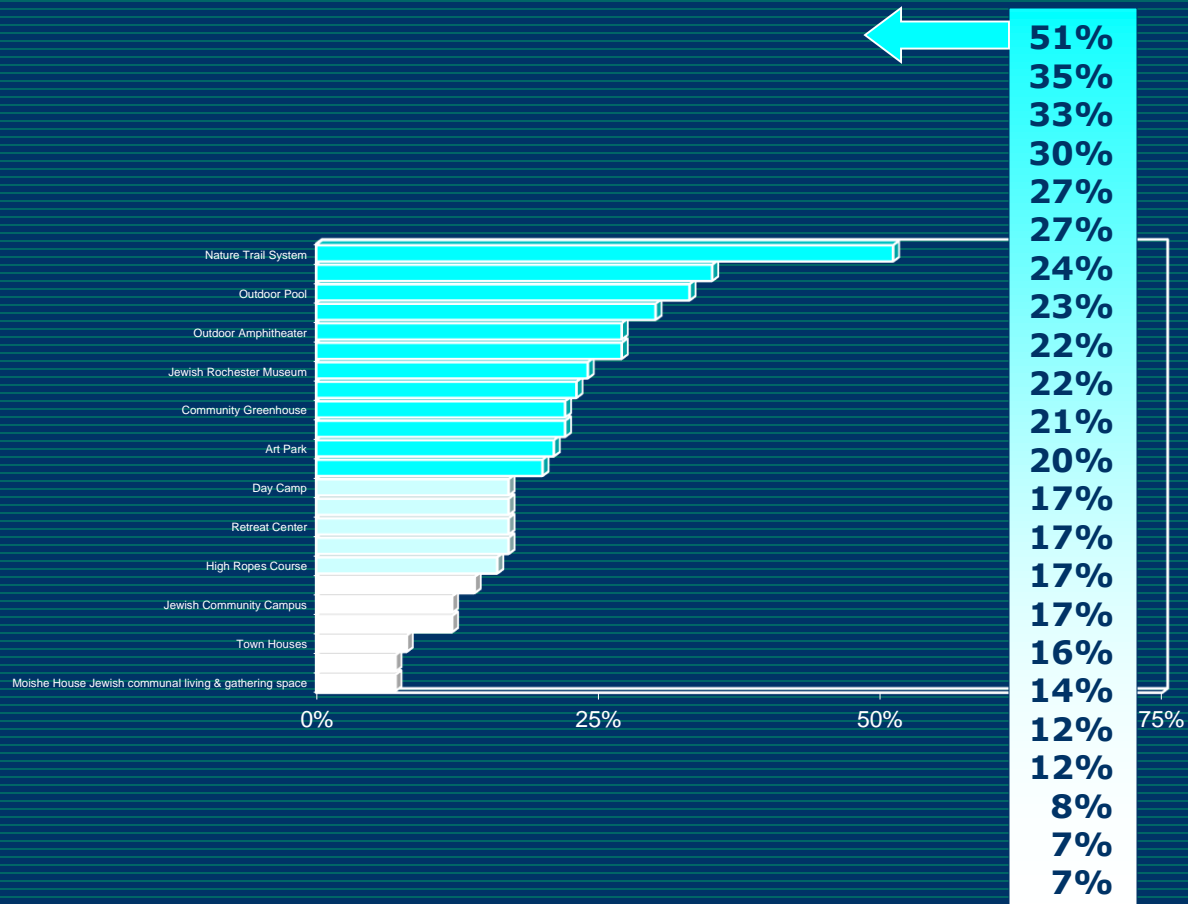
Note: The following series of charts use as their key metric the **% of respondents who chose that opportunity among their top 6 favorites.**

Described briefly below are some of the ideas now being explored. Please rate your reaction to each of these concepts as a potentially great, good, fair, or poor idea for our community...

And of all these ideas, which were your favorites? [Please choose up to 6:]

The Collective Preferences of All Our JCC-relevant Jewish Adults [N=1,565]

- Outdoor Pool
- Nature Trail System
- Performing Arts Center
- Day Camp
- Jewish Rochester Museum
- Canalside Café
- Kosher Kitchen
- Outdoor Amphitheater
- Indoor Athletic Complex
- Jewish Community Campus
- Community Garden
- Conference /Event Center
- Ice Skating Rink
- Retreat Center
- Boat House
- Community Greenhouse
- Multi-purpose Athletic Fields
- Town Houses
- Art Park
- "Moishe House*"
- Community Farm & Petting Zoo
- High Ropes Course
- Camping Grounds



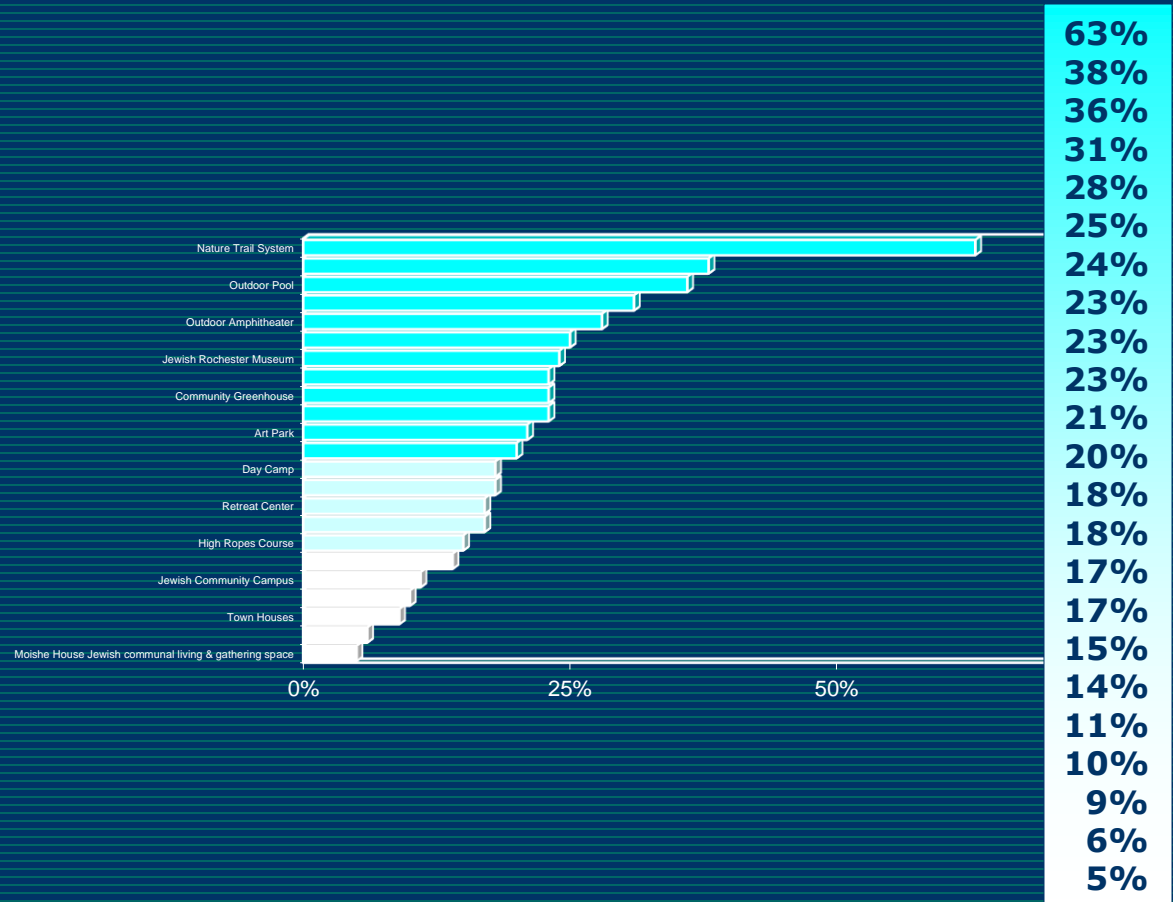
(*Jewish communal living & gathering space)

Described briefly below are some of the ideas now being explored. Please rate your reaction to each of these concepts as a potentially great, good, fair, or poor idea for our community...

And of all these ideas, which were your favorites? [Please choose up to 6:]

The Collective Jewish Adult Preferences of our JCC's Current Members [N= 770 of 1,565]

- Outdoor Pool
- Day Camp
- Nature Trail System
- Performing Arts Center
- Canalside Café
- Indoor Athletic Complex
- Kosher Kitchen
- Jewish Community Campus
- Outdoor Amphitheater
- Jewish Rochester Museum
- Conference / Event Center
- Community Garden
- Boat House
- Multi-purpose Athletic Fields
- Retreat Center
- Ice Skating Rink
- Community Greenhouse
- Town Houses
- "Moishe House*"
- Art Park
- High Ropes Course
- Community Farm & Petting Zoo
- Camping Grounds



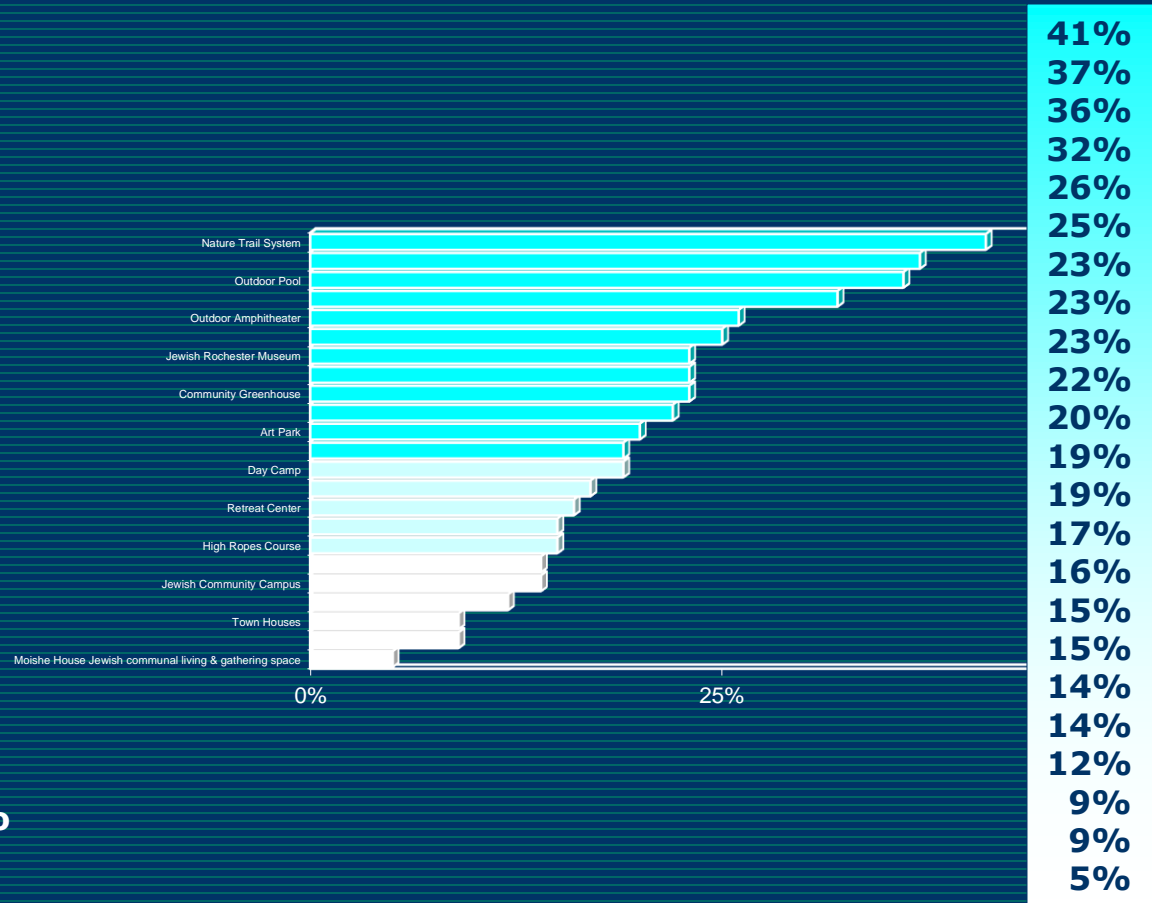
(*Jewish communal living & gathering space)

Described briefly below are some of the ideas now being explored. Please rate your reaction to each of these concepts as a potentially great, good, fair, or poor idea for our community...

And of all these ideas, which were your favorites? [Please choose up to 6:]

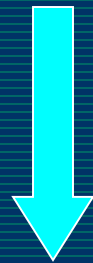
The Collective Jewish Adult Preferences of our JCC's Former Members & Program Participants [N=1,565]

- Outdoor Pool
- Performing Arts Center
- Nature Trail System
- Jewish Rochester Museum
- Canalside Café
- Outdoor Amphitheater
- Community Garden**
- Kosher Kitchen**
- Day Camp**
- Jewish Community Campus**
- Conference /Event Center**
- Indoor Athletic Complex**
- Community Greenhouse**
- Retreat Center**
- Ice Skating Rink**
- Boat House**
- Town Houses**
- Art Park**
- Multi-purpose Athletic Fields**
- "Moishe House*"**
- Community Farm & Petting Zoo**
- Camping Grounds**
- High Ropes Course**



[N=673 Jewish Adults who are former JCC members and/or program participants, but not current members]

THE TEEN PERSPECTIVE



N=125 Rochester area teens
52 of them ages 13-15
73 of them ages 16-19

The background context our teens were provided:

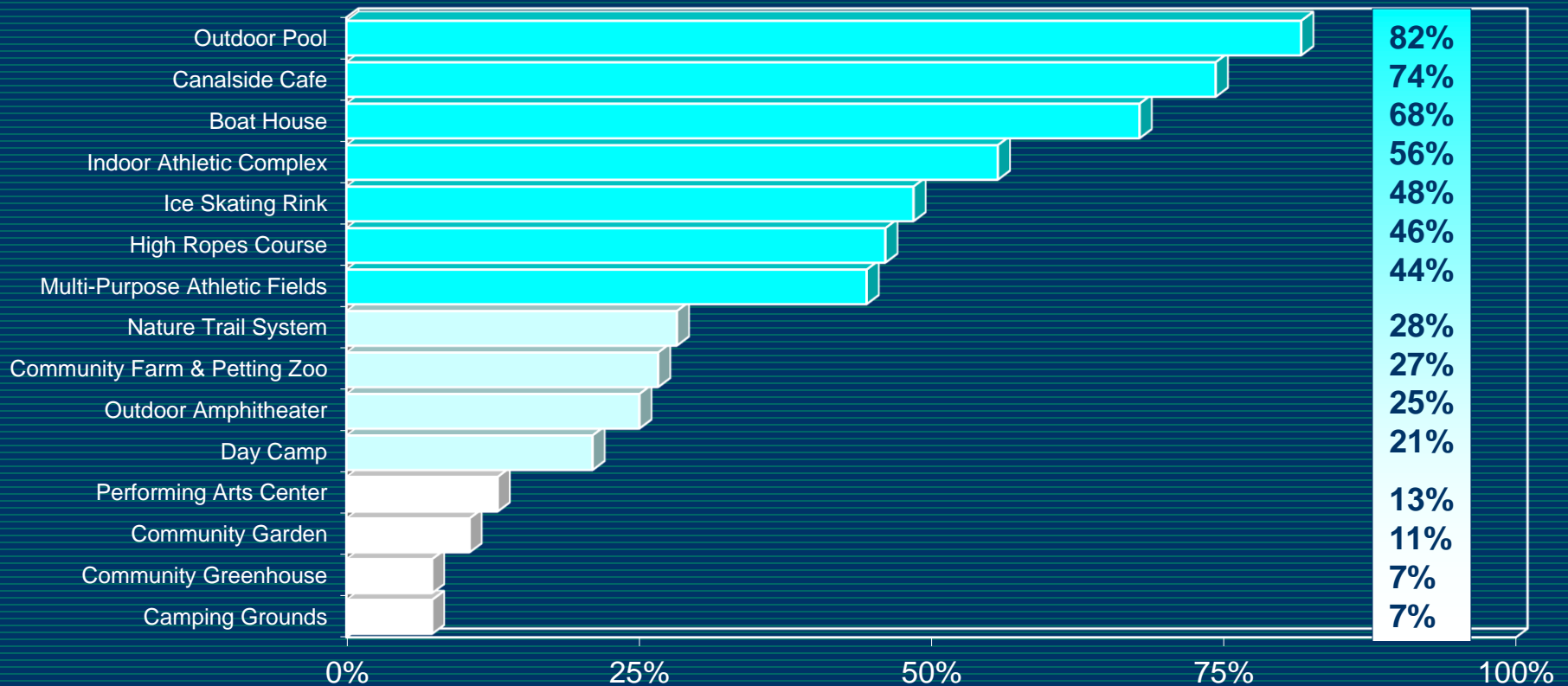
The JCC recently added 105 acres of land to their Edgewood Avenue campus.

They have begun to identify many possible uses for that land, and are asking your opinion as a Rochester area teen.

1. Would you describe each of these as a **great, good, fair, or poor idea**?
 2. Of all these ideas, **which are your favorites**? [Please choose **up to 6**:]
 3. If you have any **other ideas** for creatively using this new land, please explain:
-

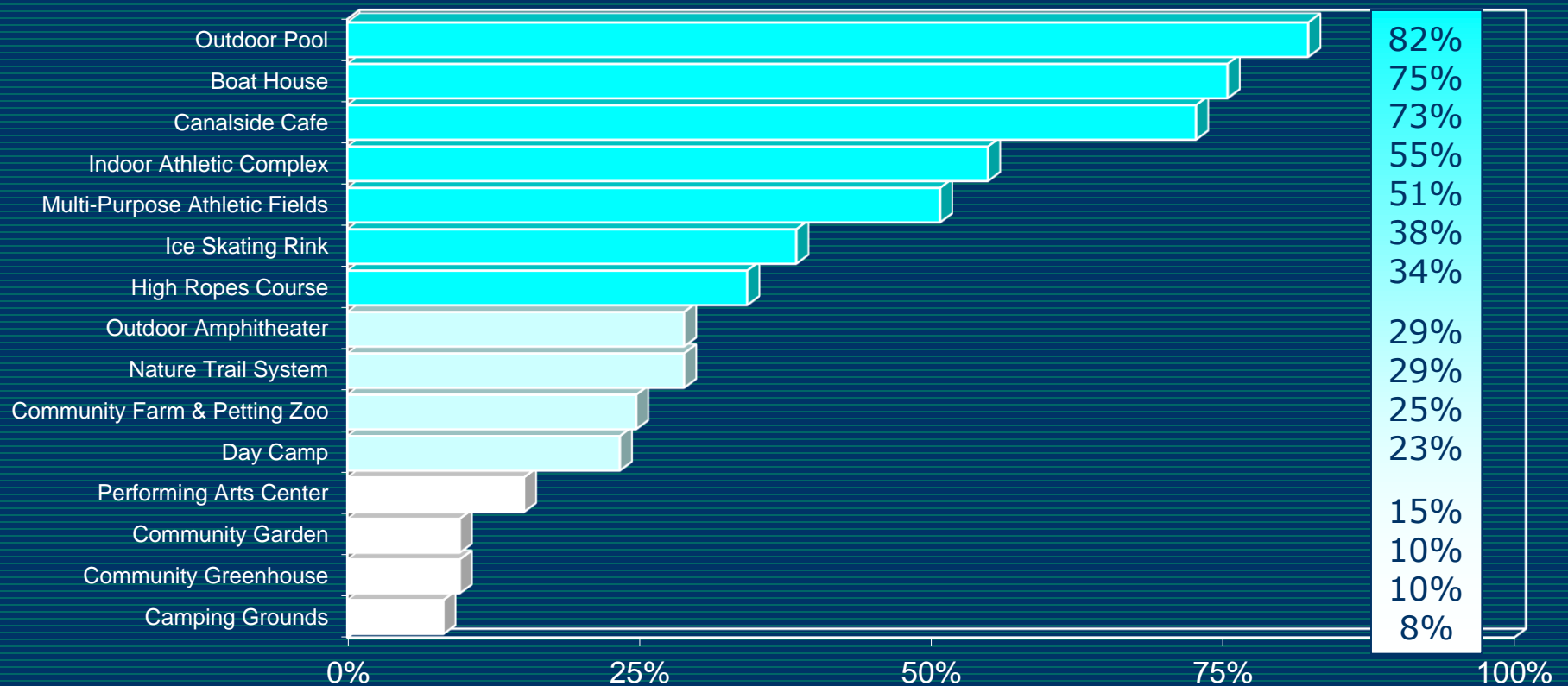
Our Rochester area teens [ages 13-19] were offered a subset of the full array of alternatives, and this was their collective set of preferences.

Arguably, they are not only the JCC's future members and supporters, but they also play a non-trivial role in their families' membership decisions.

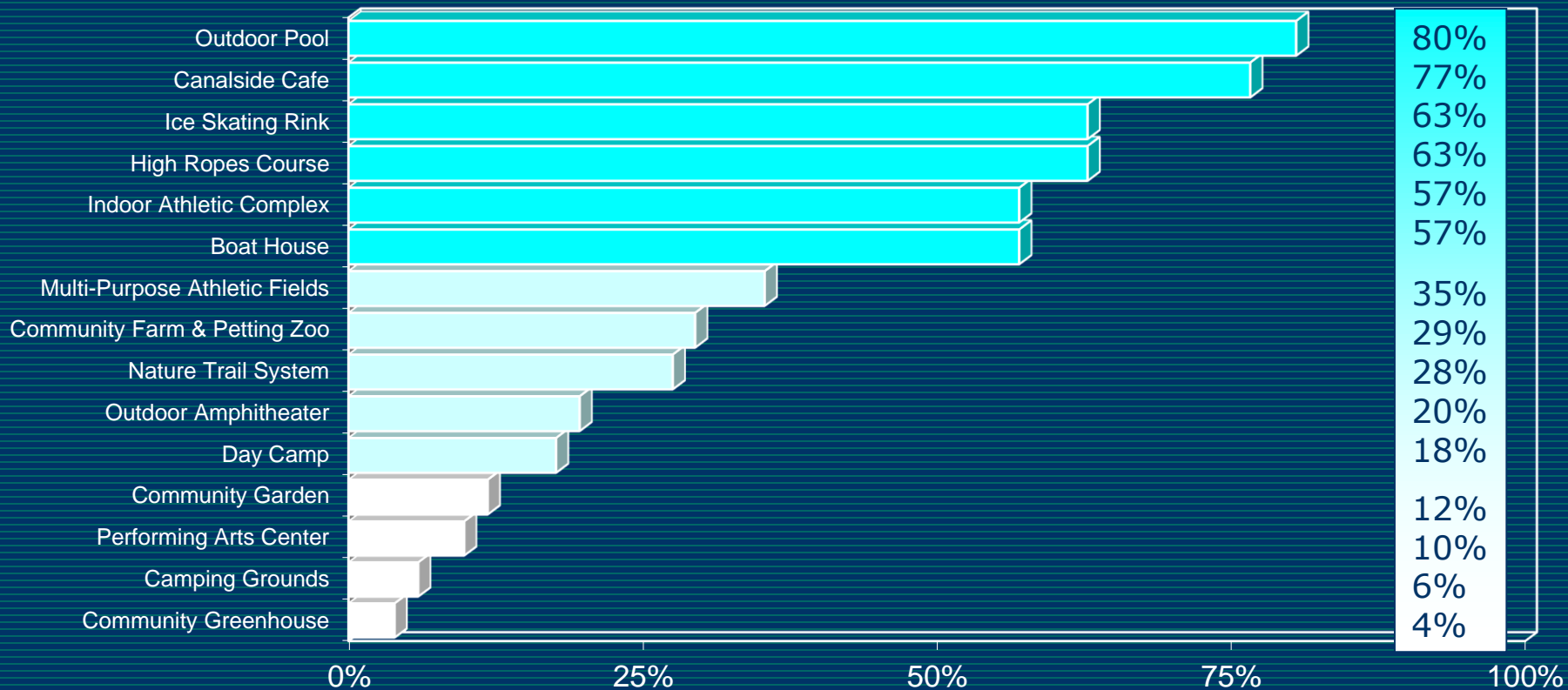


[N=125 Rochester area teens]

Looking more closely at teen priorities by age, our **older [ages 16-19] teens'** collective preferences:



Looking more closely at teen priorities by age, our **younger [ages 13-15] teens'** collective preferences:



If you have any other ideas for creatively using this new land, please explain:

- A diving board in the outdoor pool
- definitely have kayaks for the canal
- For the performing arts center, get very well known Jewish speakers, performers, etc. to come. Have people buy tickets. Think Bob Dylan, Paul Simon, Larry David, Jerry Seinfeld, etc.

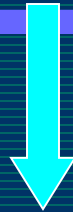
- Need a camp and facilities to compete with the new YMCA
- A new sleep-away camp for 2-week campers to try camp before coming to Camp Seneca Lake

- water park
- water park
- water park
- A water park with slides and a wave pool, laser tag, go karts, trampolines, arcade and pizzeria. Or maybe a skate park.
- JCC golf course -- or mini-putt-putt or go-karts -- amusement park!
- Shooting range. High speed Go-Carting.
- Trampolines!

- Baseball field (a JCC baseball league would be really cool)
- a food bank run by volunteers

- Basketball court
- Move dancing to other rooms -- only basketball in the current gym. Not open for basketball enough now. More basketball courts are needed.
- The indoor basketball courts should only be used for basketball. Other activities should be moved to a new location.

THE NON-JEWISH [“Jewish Adjacent”] PERSPECTIVE



N=204 out of our 350 Non-Jewish respondents answered yes to one or more of the following, and so were asked this set of JCC land use questions:

- I work (or worked) at the JCC
- I or a family member have received their services
- My child(ren) attend(ed) their Wolk preschool, Gesher after-school programs, camps, classes, shows, etc.
- I have volunteered there
- I am (or was) a member there
- I have charitably supported them
- I have participated in their programs / events

The background context our JCC-relevant Non-Jewish Adjacents were provided:

Earlier you told us that you have a relationship with the JCC, so we'd welcome your help with these next few questions.

The JCC recently purchased 105 acres of land (formally the Farash Homestead) directly adjacent to the Edgewood Campus, expanding the JCC's footprint to over 125 acres along the Erie Canal. The JCC has begun to identify a wide range of potential uses for that land, now in its natural state.

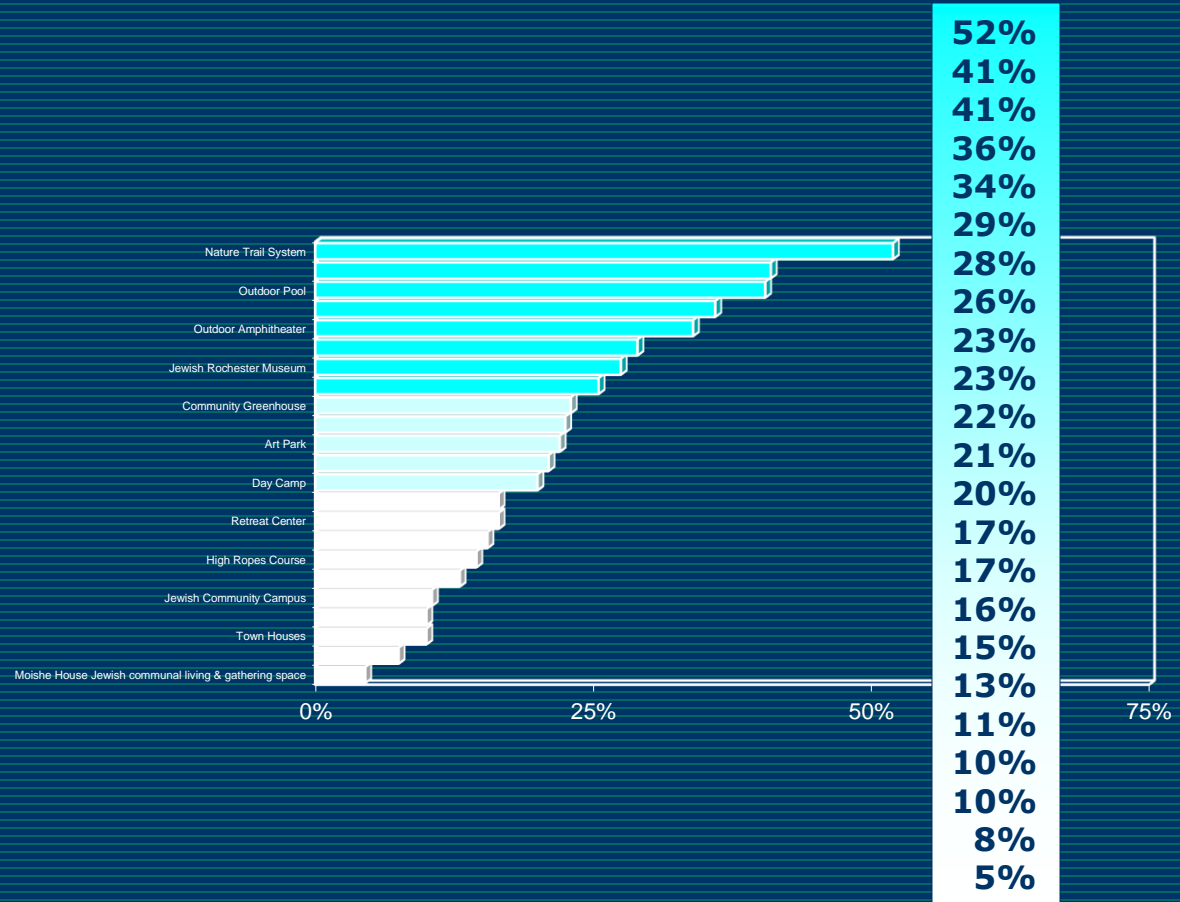
The expansion has many possibilities, with potentially huge impact on our entire Jewish community. The JCC's new leadership team has undertaken a collaborative process to re-imagine our JCC as it could potentially become tomorrow.

Looking to the future, the JCC is seeking your input and advice.

1. Described briefly below are **some of the ideas now being explored**. Please rate your reaction to **each of these concepts** as a potentially **great, good, fair, or poor idea for our community**:
2. And of all these ideas, which were your **favorites**? [Please choose up to 6:]
3. If you have any other ideas not mentioned above for creatively using this new land in ways that could help our community thrive, please explain below:

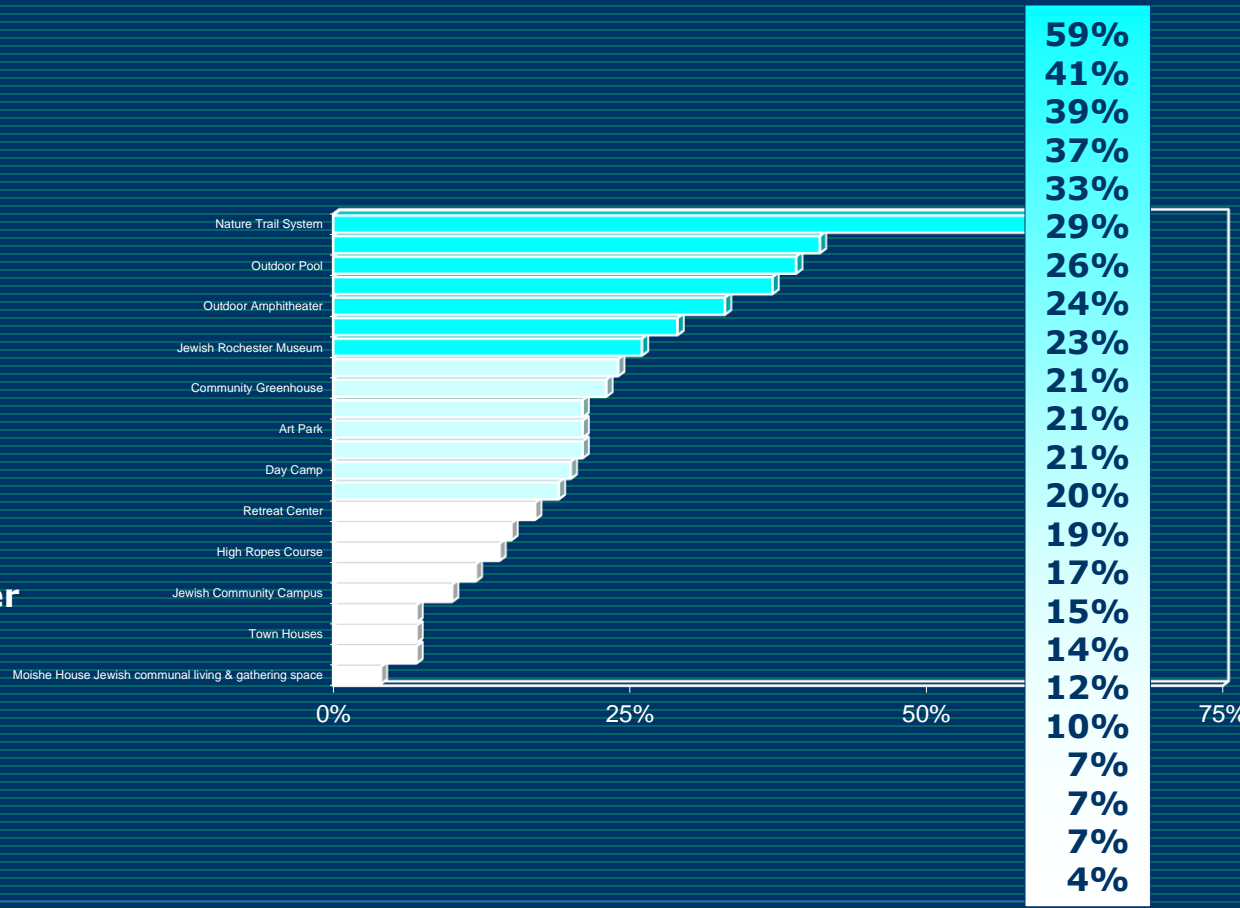
Our JCC-relevant Jewish Adjacent [N=204] were offered the full array of alternatives, and here are their collective preferences. Arguably, they represent a perspective critical to the JCC's future as members & supporters.

- Nature Trail System**
- Performing Arts Center**
- Outdoor Pool**
- Canalside Café**
- Outdoor Amphitheater**
- Community Garden**
- Jewish Rochester Museum**
- Indoor Athletic Complex**
- Community Greenhouse**
- Ice Skating Rink**
- Art Park**
- Boat House**
- Day Camp**
- Community Farm & Petting Zoo**
- Retreat Center**
- Conference Center / Event Center**
- High Ropes Course**
- Multi-purpose Athletic Fields**
- Jewish Community Campus**
- Camping Grounds**
- Town Houses**
- Kosher Kitchen**
- "Moishe House"**



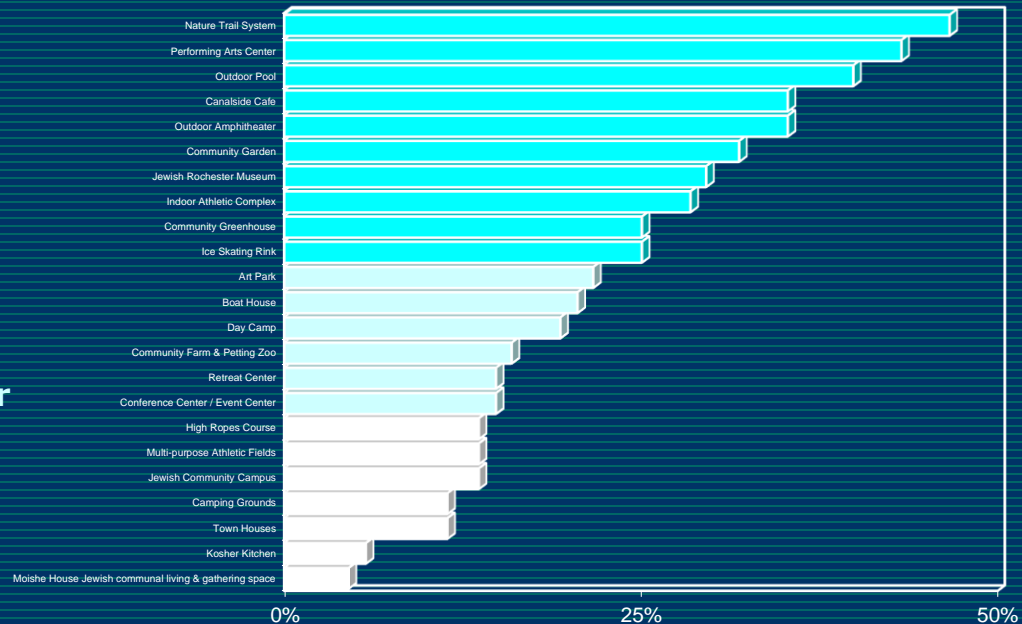
Our JCC-relevant Jewish Adjacent [N=204] included **113 who either are, or were, JCC members**, and here are their collective preferences:

- Nature Trail System
- Outdoor Pool
- Canalside Café
- Performing Arts Center
- Outdoor Amphitheater
- Community Garden
- Community Greenhouse
- Day Camp
- Indoor Athletic Complex
- Jewish Rochester Museum
- Boat House
- Ice Skating Rink
- Art Park
- Community Farm & Petting Zoo
- High Ropes Course
- Conference Center / Event Center
- Multi-purpose Athletic Fields
- Retreat Center
- Kosher Kitchen
- Jewish Community Campus
- Camping Grounds
- Town Houses
- "Moishe House"



The other **91** of our JCC-relevant Jewish Adjacent [N=204] have **not yet been members**, and here are their collective preferences:

- Performing Arts Center
- Nature Trail System
- Outdoor Pool
- Outdoor Amphitheater
- Jewish Rochester Museum
- Canalside Café
- Community Garden
- Indoor Athletic Complex
- Ice Skating Rink
- Art Park
- Retreat Center
- Boat House
- Community Greenhouse
- Conference Center / Event Center
- Jewish Community Campus
- Day Camp
- Community Farm & Petting Zoo
- Camping Grounds
- Town Houses
- Multi-purpose Athletic Fields
- High Ropes Course
- "Moishe House"
- Kosher Kitchen



- 47%
- 43%
- 40%
- 35%
- 35%
- 32%
- 30%
- 28%
- 25%
- 25%
- 22%
- 21%
- 19%
- 16%
- 16%
- 15%
- 15%
- 14%
- 14%
- 14%
- 11%
- 11%
- 6%
- 5%

Concluding Summary

- Although this survey's over-arching theme is that **"Every Voice Counts"**, when it comes to evaluating a set of long-term investment decisions like the ones the JCC is now facing, **some voices realistically count more than others.**

- Strategically and tactically, for example, the JCC may decide to invest in certain projects to reward and retain **current members**. Other projects may help to bring in **new members**, or bring back **former members**. Some projects may fill a need **within our Jewish community**, while others may **reach beyond** to serve our non-Jewish "adjacents". **Teens** don't write the membership dues check, but they might well influence their family's membership decisions. While the upcoming summary slide assembles side-by-side the ranked collective priorities of various respondent segments, it is really up to the JCC leadership to decide which combination of voices count most.

Concluding Summary (continued)

- Since our survey fielded, the new YMCA opened nearby, and alongside the challenge of a wide range of other entities whose offerings overlap those of the JCC, the **competitive landscape has become increasingly intense. Moreover, COVID has brought constraints and challenges that could never have been anticipated.**
- Strategic clarity is needed to identify the **unique competitive differentiators** that our JCC can provide -- given its assets of the past, coupled with those of the present and future -- to **define and focus on the roles that it is uniquely capable of playing, both within and beyond our Jewish community.**
- While the chart on the following page shows which of the 23 thumbnail concepts were seen as most appealing – and by whom – this input is clearly just the tip of the iceberg alongside myriad **other considerations** related to funding, permitting, revenue potential, risk potential, etc. Nonetheless, this insight provides a **helpful starting point** in terms of understanding what 1,614 of our community's survey participants most want, need, and value.

	All teens	Teens 13-15	Teens 16-19	All JCC-linked NJ	NJ JCC Members	NJ Non-Members	All Jew Adults	J Adult Members	Jew Non-Members	Overall Rank
Outdoor Pool	1	1	1	3	2	3	1	1	1	1
Nature Trail System	8	9	9	1	1	2	2	3	3	3
Performing Arts Center	12	13	12	2	4	1	3	4	2	4
Day Camp	11	11	11	13	8	16	4	2	9	
Jewish Rochester Museum				7	10	5	5	10	4	
Canalside Café	2	2	3	4	3	6	6	5	5	2
Kosher Kitchen				22	19	23	7	7	8	
Outdoor Amphitheater	10	10	8	5	5	4	8	9	6	
Indoor Athletic Complex	4	5	4	8	9	8	9	6	12	
Jewish Community Campus				19	20	15	10	8	10	
Community Garden	13	12	13	6	6	7	11	12	7	
Conference / Event Center				16	16	14	12	11	11	
Ice Skating Rink	5	3	6	10	12	9	13	16	15	
Retreat Center				15	18	11	14	15	14	
Boat House	3	6	2	12	11	12	15	13	16	
Community Greenhouse	14	15	14	9	7	13	16	17	13	
Multi-Purp Athletic Fields	7	7	5	18	17	20	17	14	19	
Town Houses				21	22	19	18	18	17	
Art Park				11	13	10	19	20	18	
Moishe House				23	23	22	20	19	20	
Comm. Farm/Petting Zoo	9	8	10	14	14	17	21	22	21	
High Ropes Course	6	4	7	17	15	21	22	21	23	
Camping Grounds	15	14	15	20	21	18	23	23	22	
# of Respondents [N]	125	52	73	204	113	91	1565	770	673	

Top choices for everyone across the board: Outdoor pool, Canalside Café

→ **Top choices for adults [not teens]: Nature trails, Performing Arts Center**

→ **Top choices for teens: Boat house, Skating Rink, Indoor Athletic Complex**

→ **Top choices for non-Jews and Jewish non-Members: Outdoor Amphitheater, Community Garden**

Concluding Summary (continued)

- The JCC's leadership now has a **highly robust body of data** representing a significant sample of various perspectives, not only to inform their own decision-making, but also to present to potential funders and to the community at large.
- Whatever choices are made can now be understood as **rational, solidly substantiated, and informed** by real data-based insight, and not mere anecdotal input.
- **Although this survey was conducted pre-COVID, and the evolving COVID reality is significantly altering the future in ways we cannot yet predict, these findings at least provide some solid directional guidance by showing us what a full spectrum of survey participants, representing a wide array of perspectives, would most like to see provided. We wish the JCC great success in allocating its resources towards whatever land use opportunities will most meaningfully benefit our community going forward.**

... questions or comments?

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Jewish Federation of Greater Rochester