

Open Does Not Mean Okay: Child Care After A Year Of Pandemic


March 2021

Presented by
Action for Children



Timeline


- **March 26, 2020**
 - Child Care closes to all but families of essential workers
 - New Pandemic Child Care rules limit group size and adult-child ratios, introduce enhanced cleaning and communicable disease prevention steps
- **May 31, 2020**
 - Child Care reopens for all who can afford it
 - Pandemic licensing rules apply to all child care
- **June – November 2020**
 - Ohio Department of Job and Family Services provides \$60 million in relief to programs statewide
- **August 10, 2020**
 - Governor permits child care centers to choose whether to comply with ongoing pandemic rules or switch back
- **September – November 2020**
 - City of Columbus and Franklin County join to provide \$8.2 million in targeted relief to programs



Central Ohio Child Care Provider Survey

Background

- Initiated on May 4, 2020 to meet community needs
- Ongoing survey of licensed providers in Delaware, Fairfield, Franklin, Licking, Madison, Pickaway, and Union counties
- The only survey of its kind in Ohio
- Enhanced by qualitative information obtained by AFC staff who work daily with families and with providers
- Consulted by public officials to inform relief efforts



Central Ohio Child Care Provider Survey

Methodology

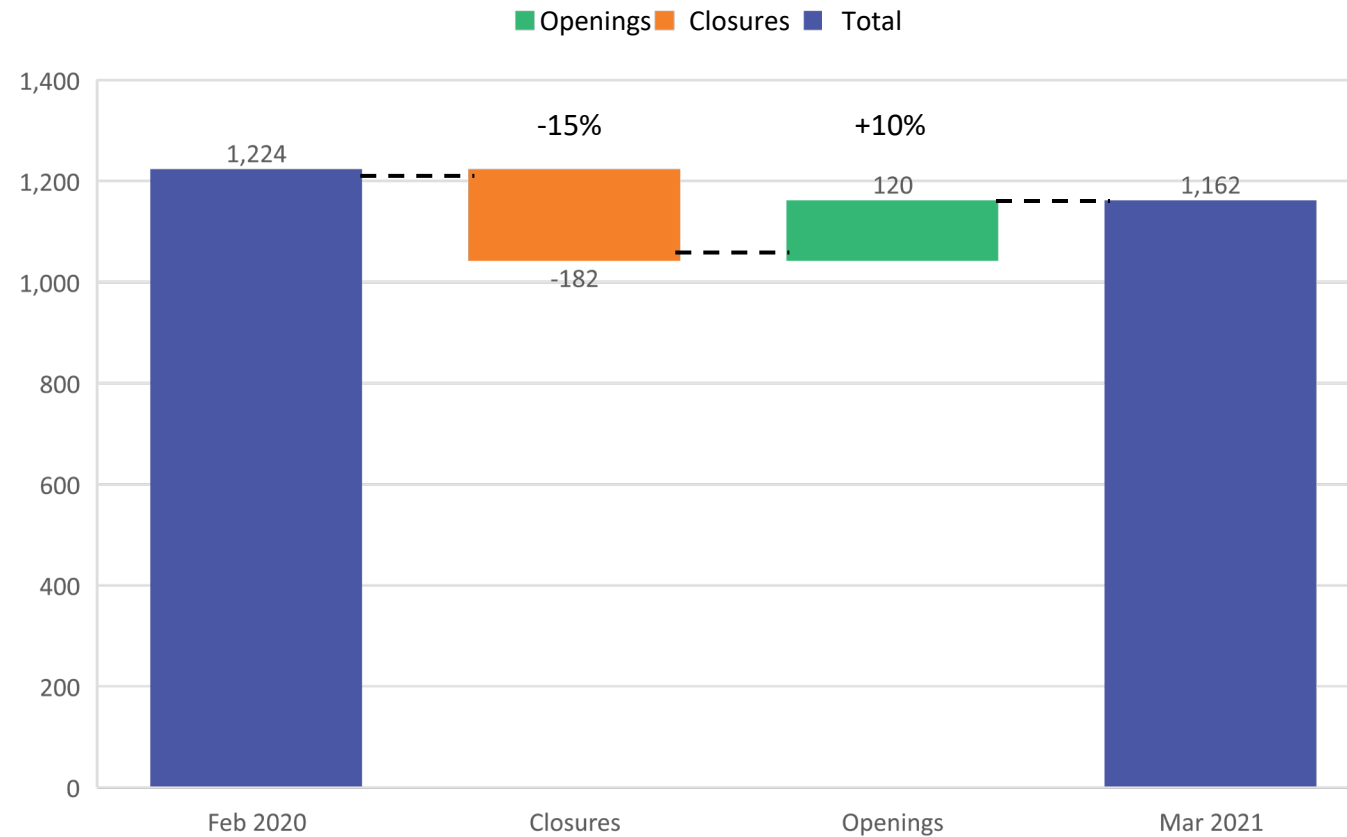
- Distributed March 3rd, 2021 to 1,243 providers
- Collected 299 responses (220 Centers, 79 Homes)
- The results are statistically significant with 95% confidence and a margin of error of 5%

Objectives

- Quantitative data regarding current state of child care
- Qualitative feedback on challenges facing providers

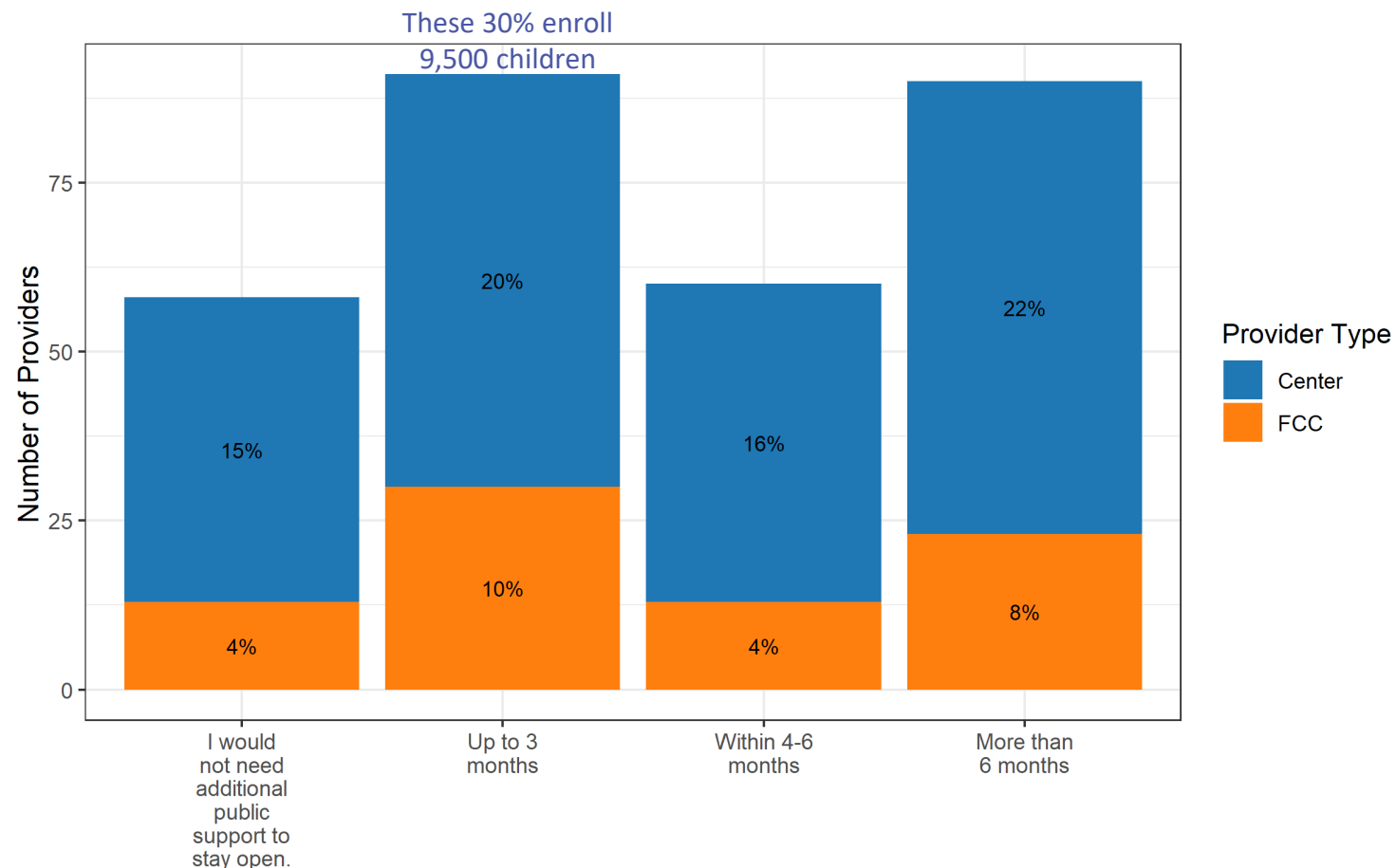
Since pre-pandemic, 15% of providers remain closed one year later

With new providers opening, the net closure rate is -5%.



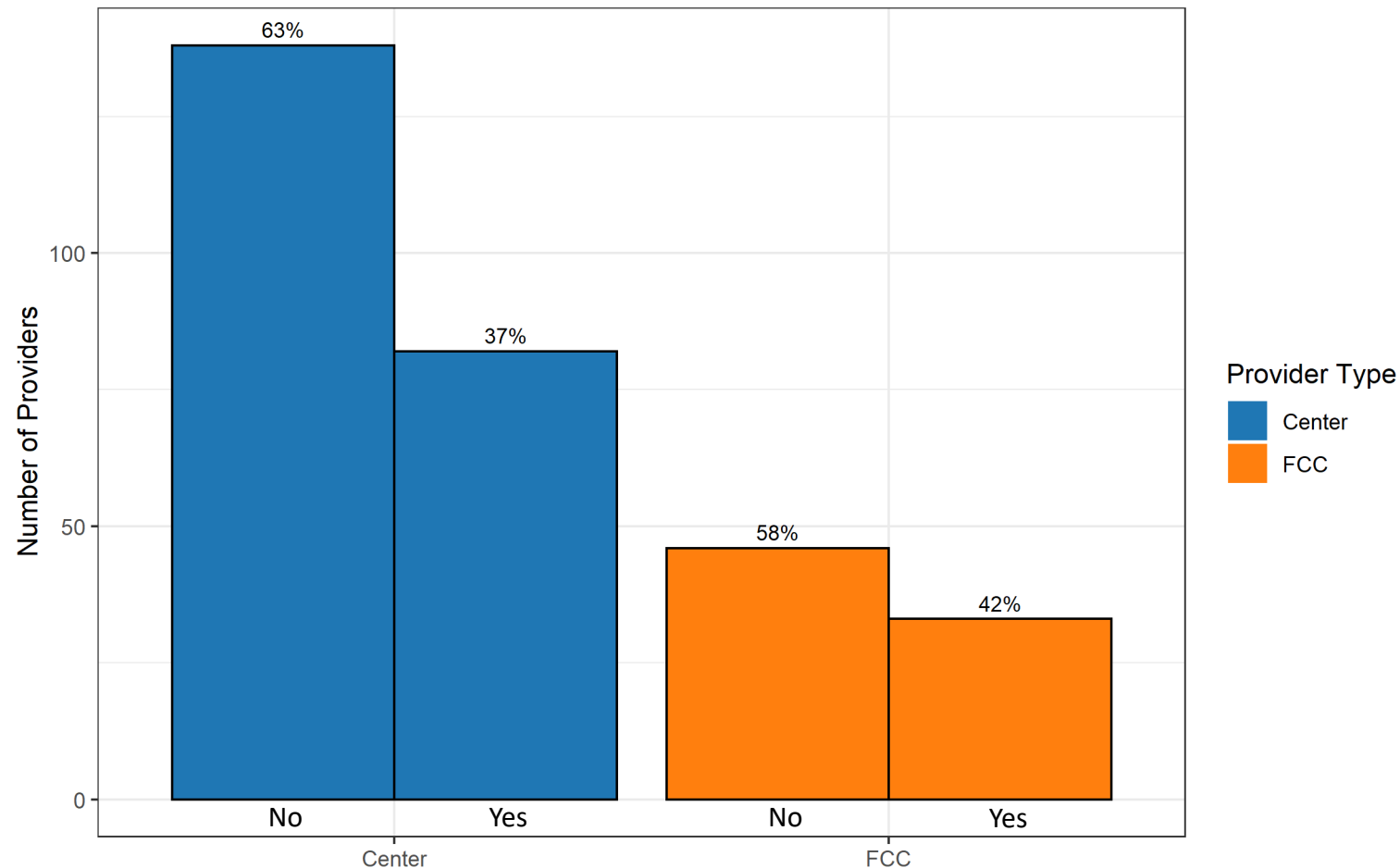
30% of providers anticipate closing within 3 months

Now, think about your financial situation. Under current operations, how long could you keep your program open without additional public support? (S0615) (n=299)



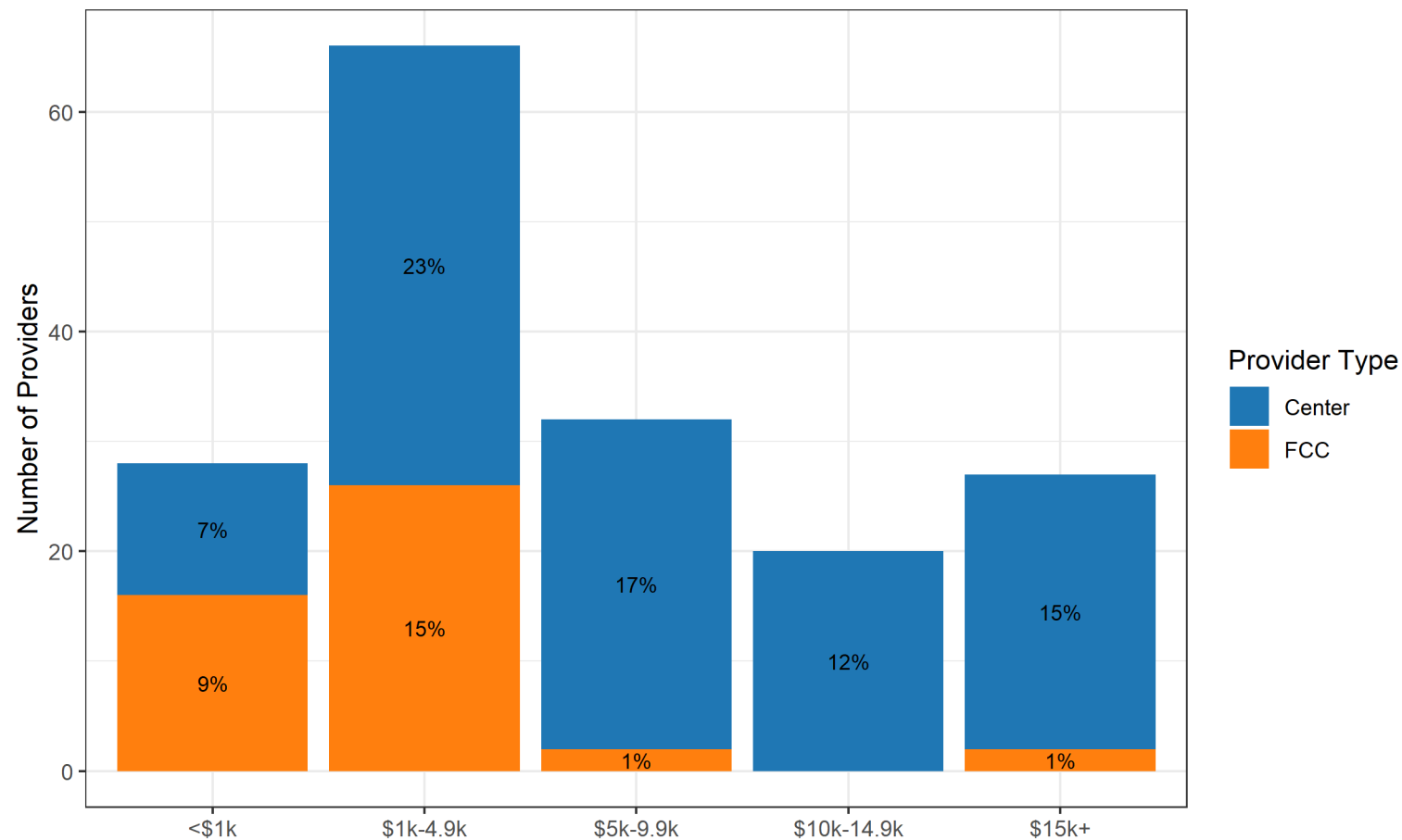
For more than half of providers, monthly revenue does not cover expenses

Does the monthly revenue you receive (tuition, fees, grants, etc.) currently cover your monthly operating expenses? (S0603A) ($n=299$)



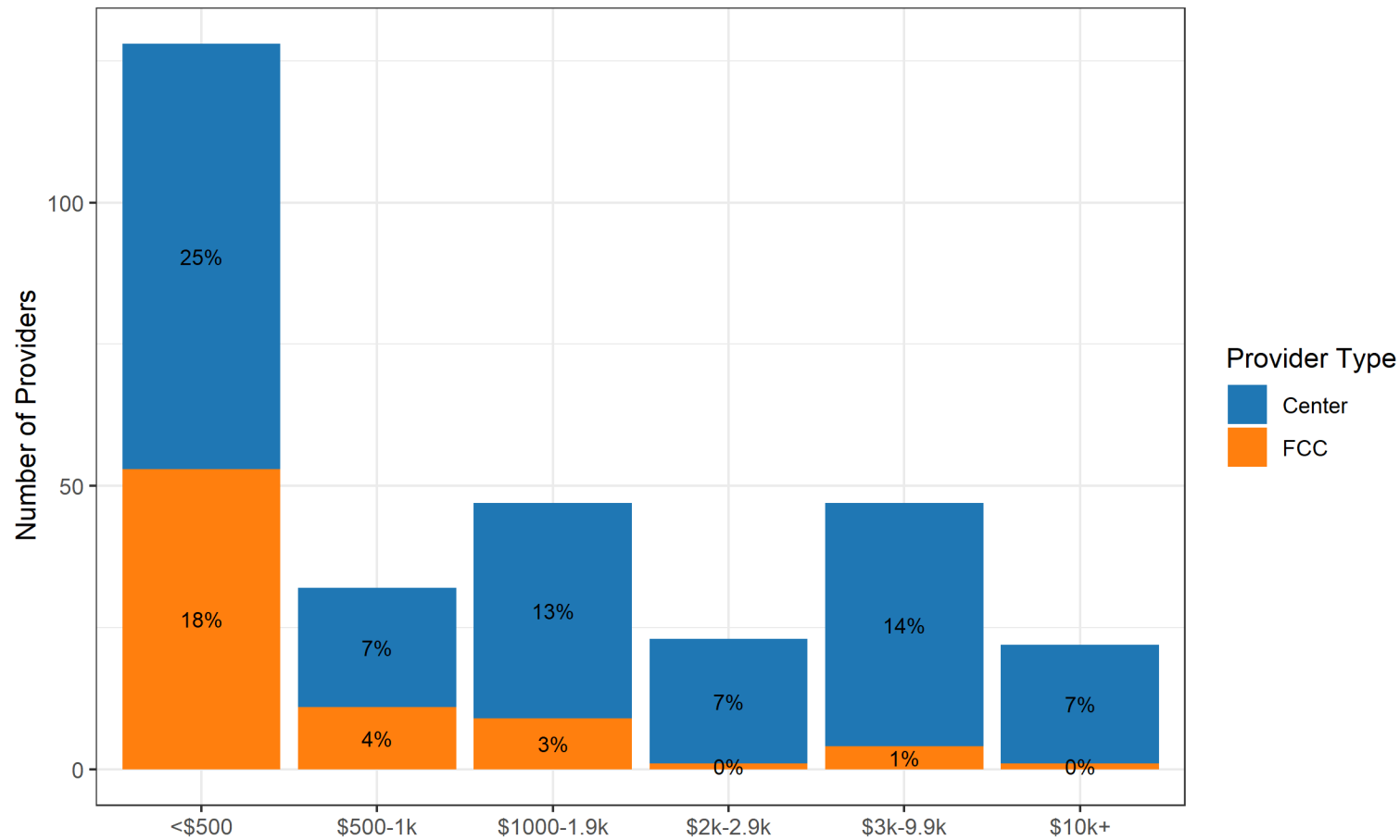
For respondents with a monthly gap, 46% need over \$5,000

If your monthly expenses exceed your monthly revenue, what is your current monthly projected financial gap? (S0604) (n=172)



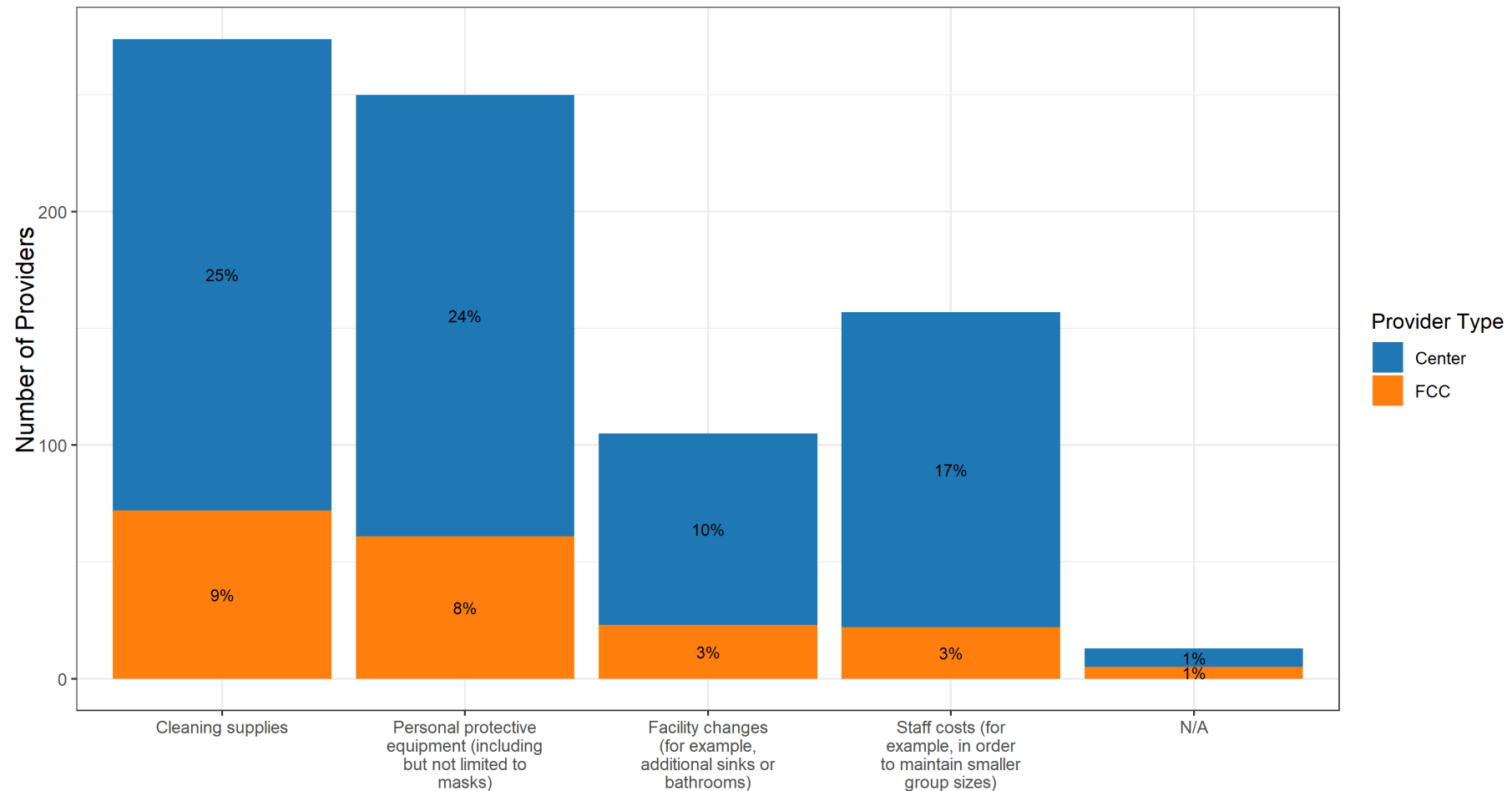
45% of providers are paying more than \$1,000 monthly for additional costs

Approximately how much do these additional costs add up to PER MONTH? (S0614) (n=299)

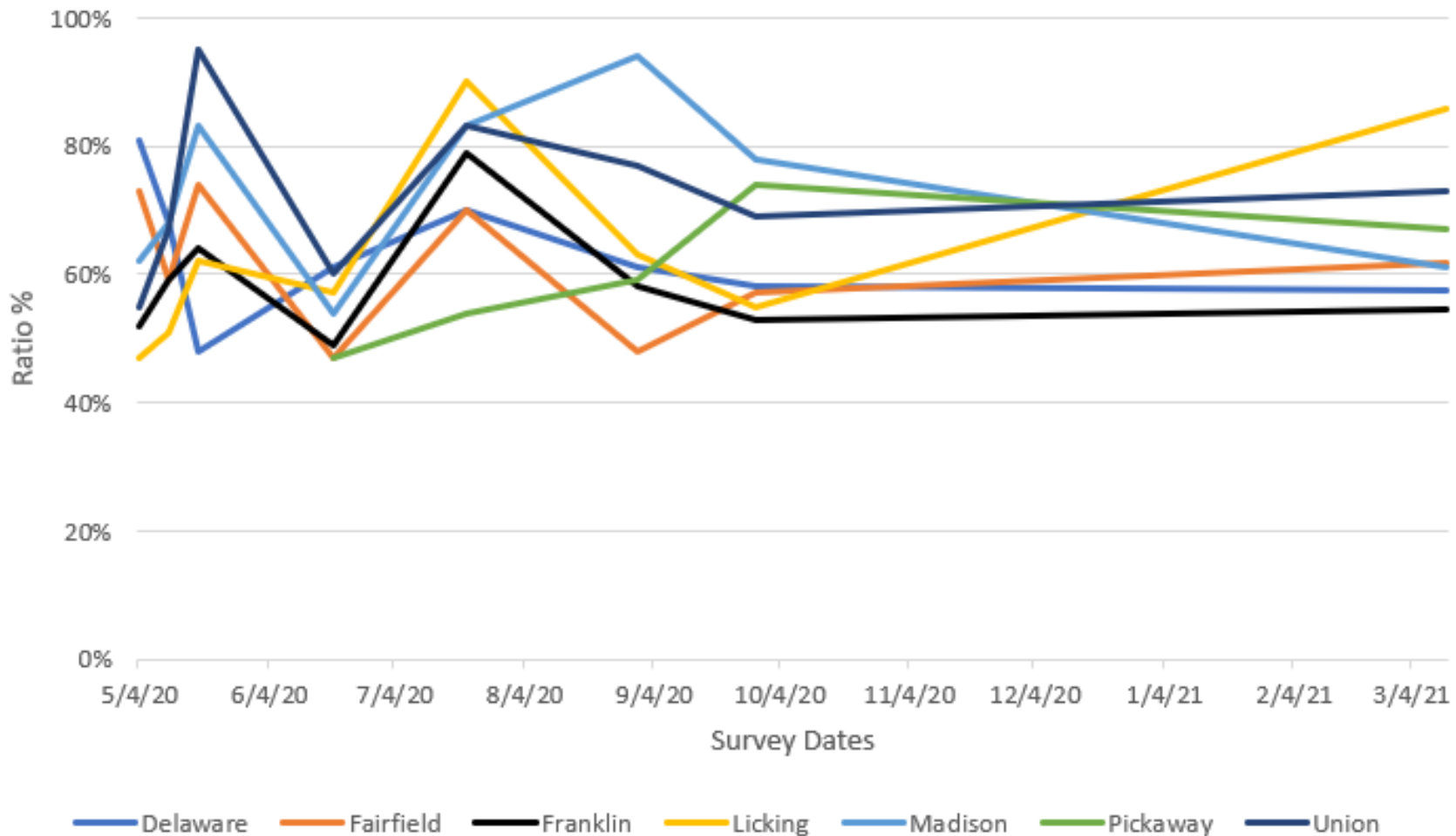


Cleaning supplies and PPE continue to be largest source of additional expense

What types of additional costs, if any, are your program incurring to accommodate changes that keep children, families, and staff members safe? (S0613) ($n=799$)

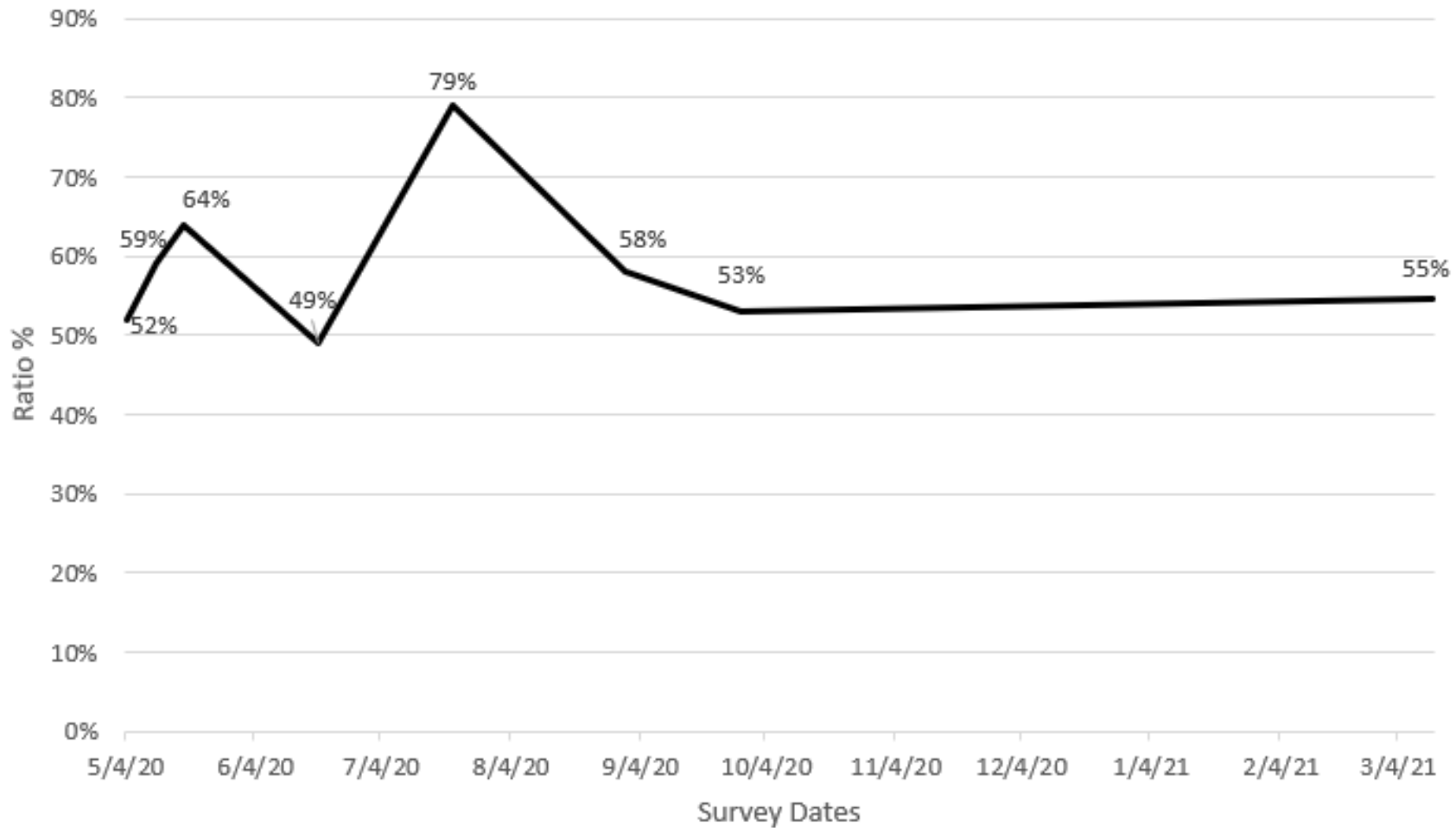


The enrollment ratio* increased by 3% over the last survey across the region



*Enrollment ratio: enrollment as a percentage of provider capacity

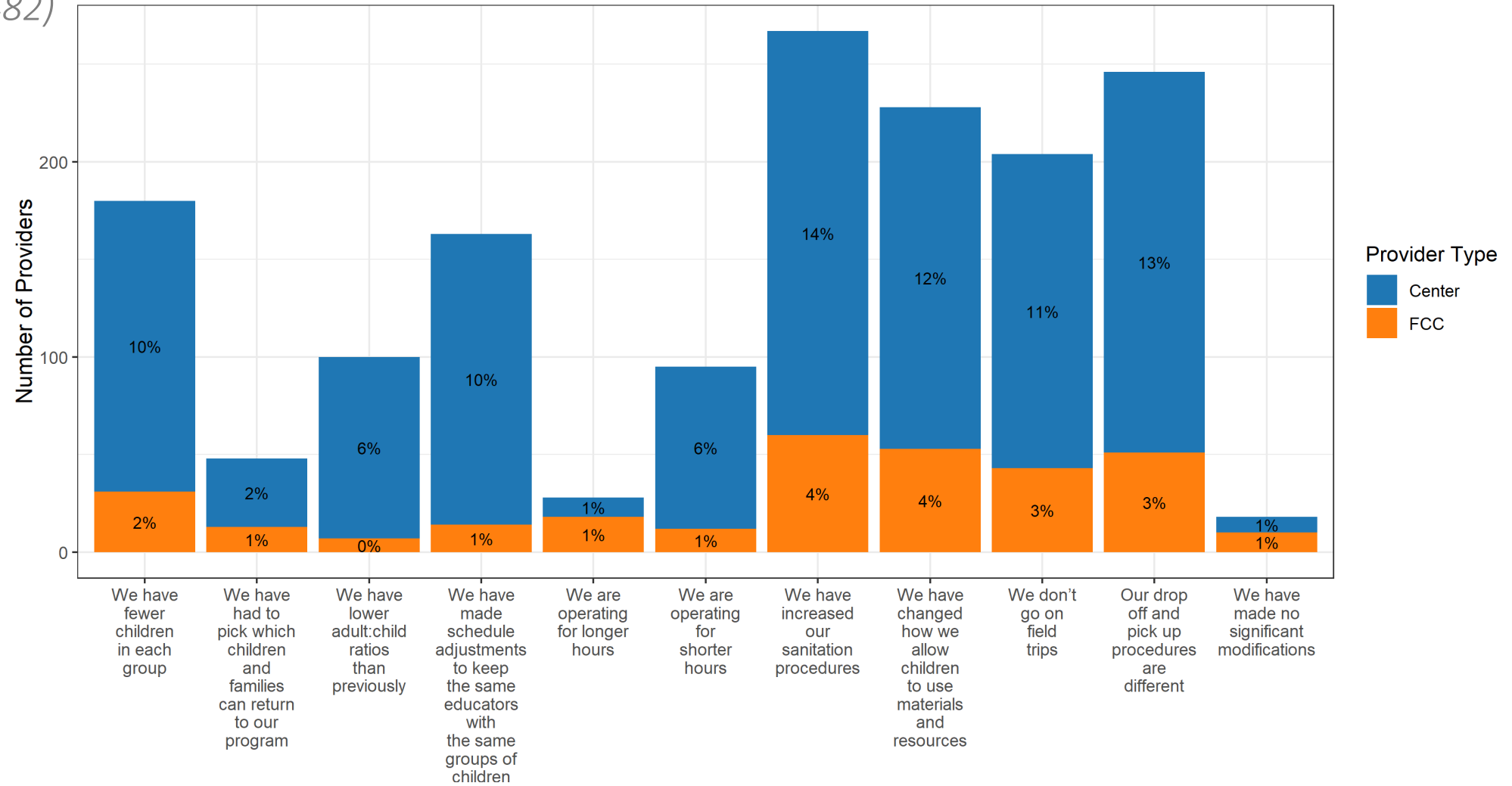
The Franklin County enrollment ratio* increased by 2% over the last survey



*Enrollment ratio: enrollment as a percentage of provider capacity

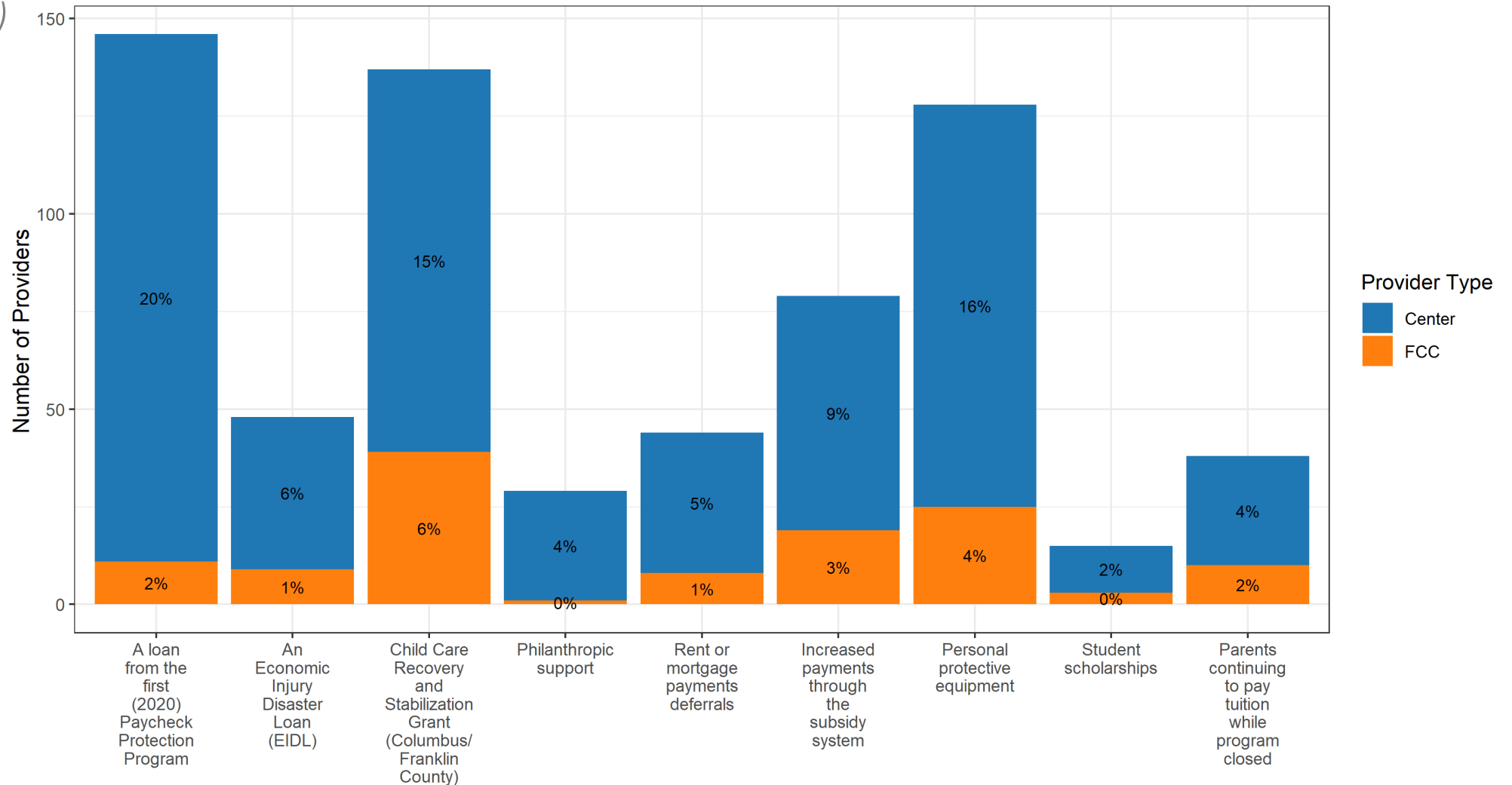
Providers have made 5 changes to their practice on average

If your program is open, what kind of modifications have been made (select all that apply)? (S0511)
(n=1,482)



Respondents have received financial assistance from 2 sources on average

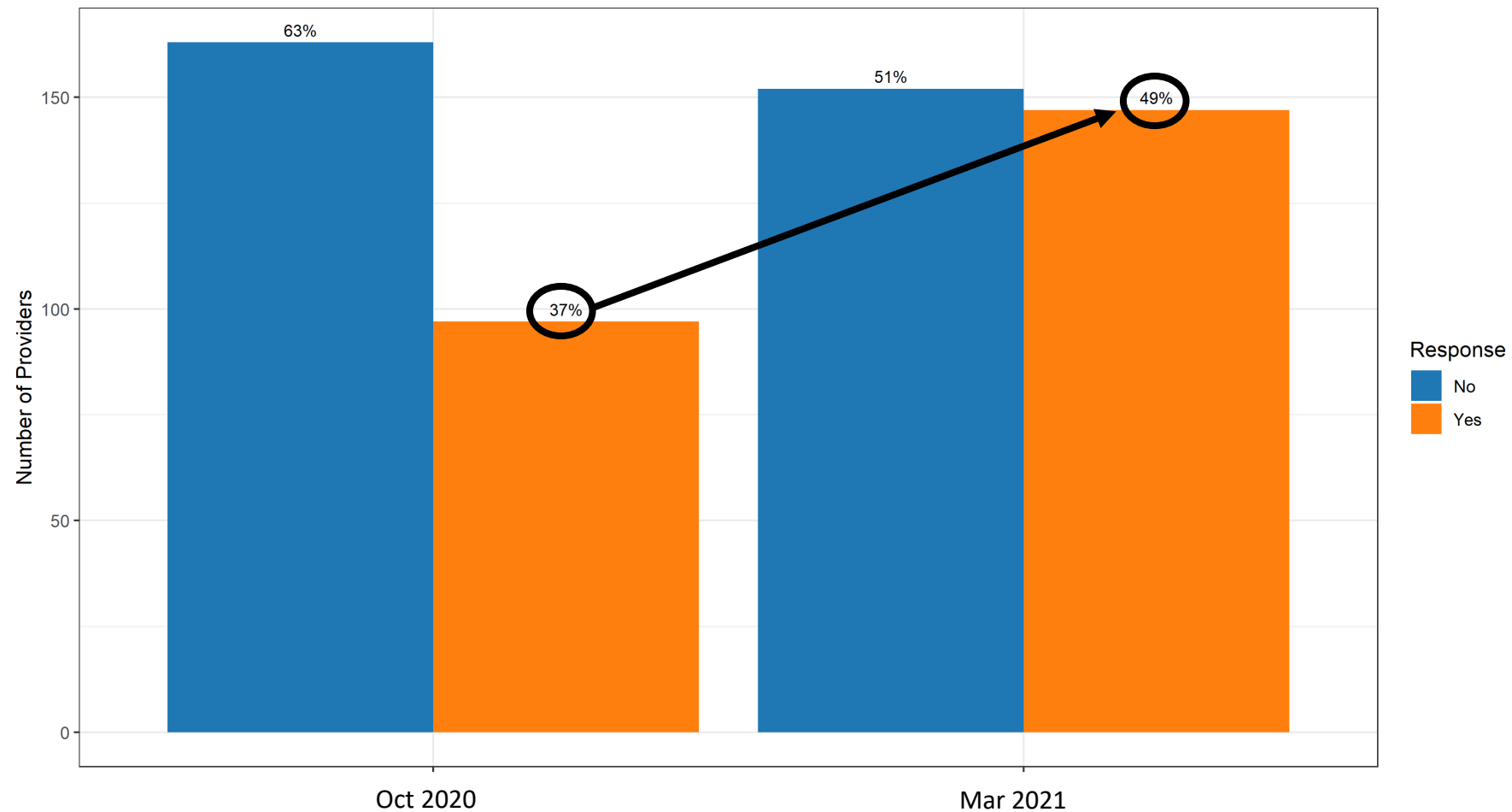
What types of support has your program received to help it survive? (Choose all that apply). (S0612A)
(n=664)



Providers are increasingly turning to tuition increases

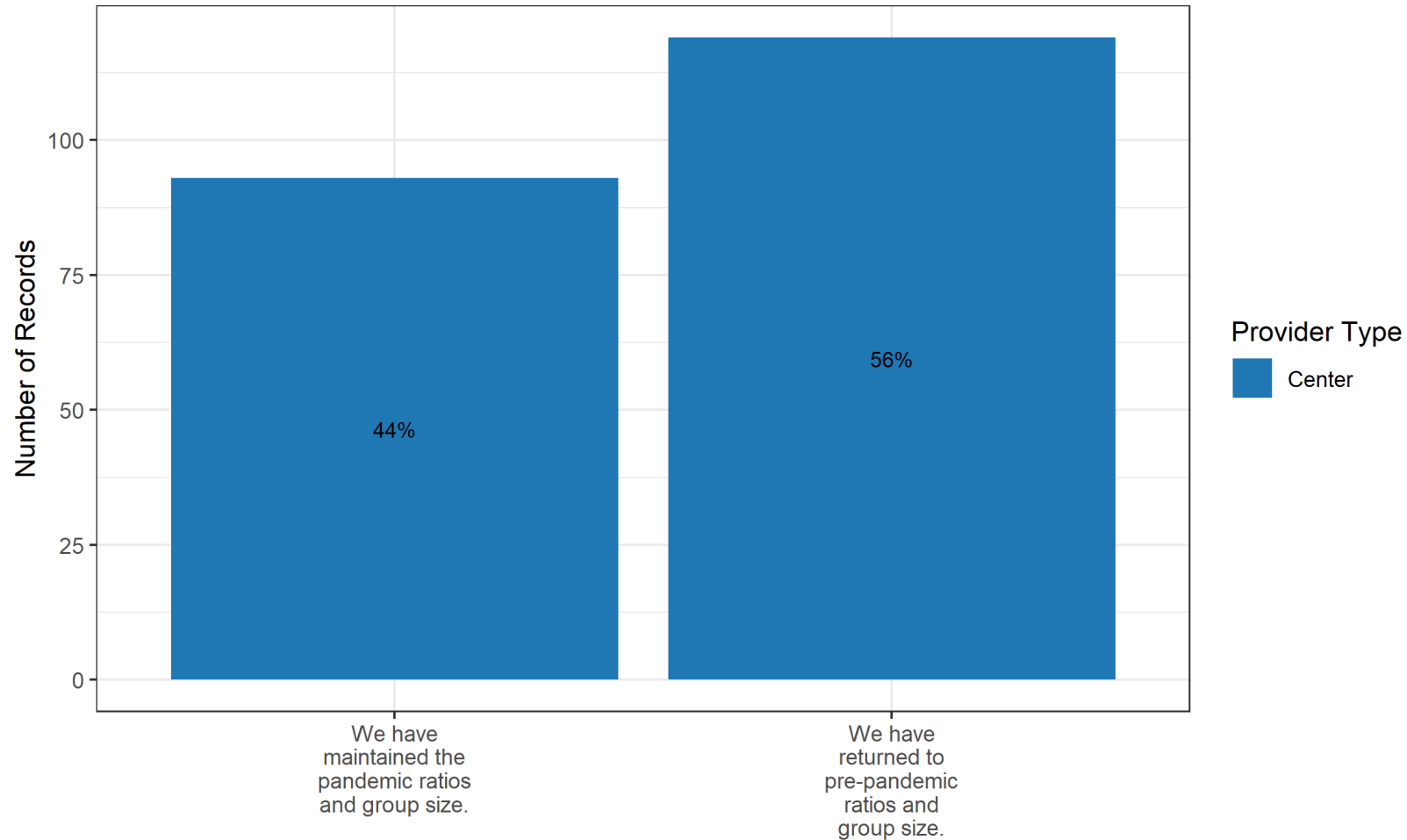
Have you had to or are you planning to increase tuition for families? (S0611A) ($n=299$)

This difference is statistically significant ($p < 0.01$)



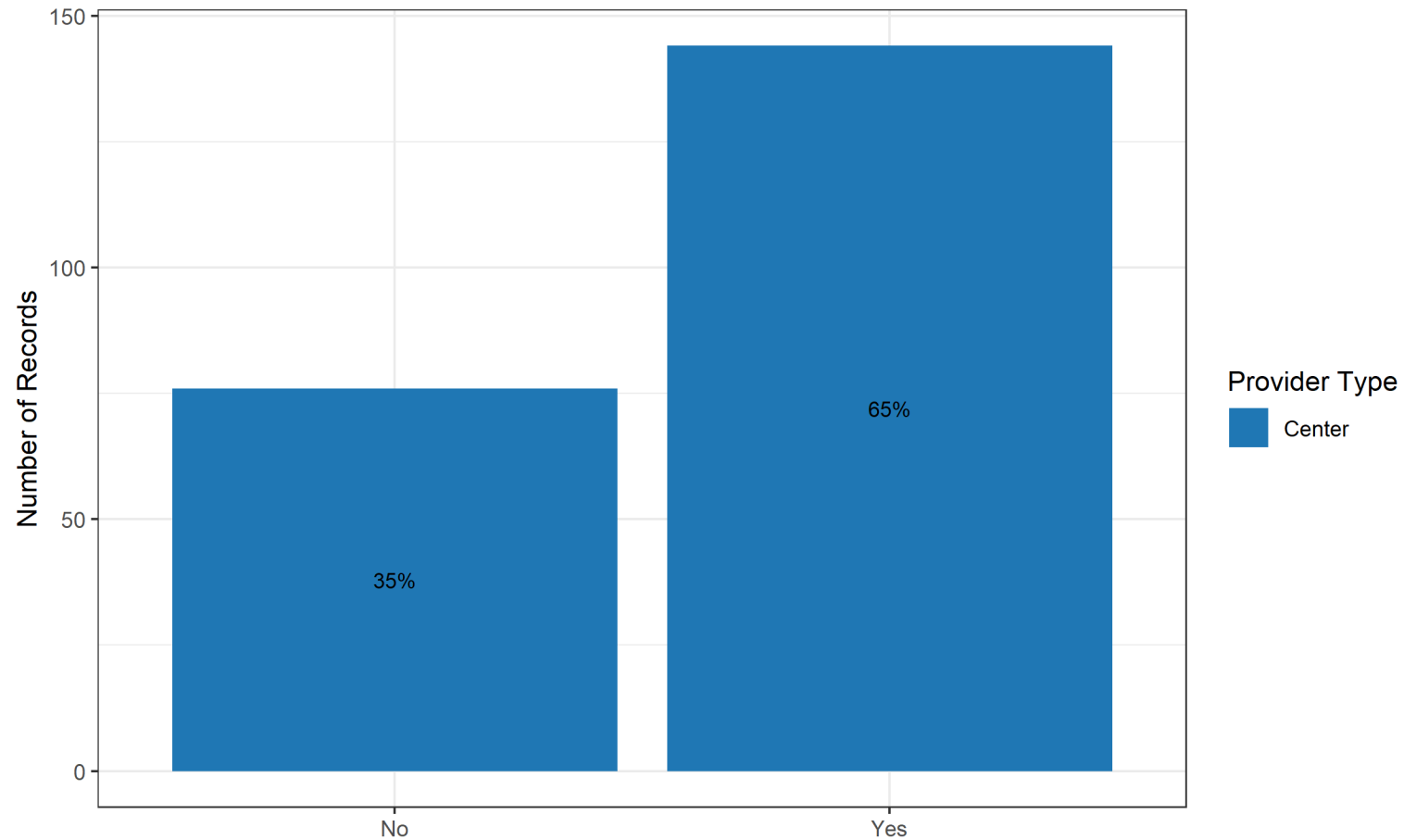
Most providers have returned to pre-pandemic ratios

What licensing standard are you using? (S0408A) (n=212)



More than one third of centers are experiencing staff shortages

Based on your current enrollment, are you fully staffed? (S0506A) (n=220)



Staff openings are significant with a total of nearly 1,000 for the region

How many positions are you seeking to fill? (S0507) ($n=73$)

