Action for Children

Reckoning, Not Recovery

CENTRAL OHIO CHILD CARE PROVIDER SURVEY REPORT

November 2022

Background

Initiated in May 2020 to meet community and provider needs, Action for Children's Central Ohio Child Care Provider Survey collects vital information from licensed child care providers in Delaware, Fairfield, Franklin, Licking, Madison, Pickaway, and Union counties about the local landscape of child care. These counties comprise Service Delivery Area (SDA) 9 in Ohio's Child Care Resource & Referral Network.

This ongoing survey, the only one of its kind in Ohio, is enhanced by the qualitative information obtained by Action for Children staff who work daily with child care providers and families. Insight gathered from this survey not only guides our own work, but is consulted by public and private sector leaders to inform relief efforts and strengthen supports for providers and families.

Methods

- Online survey distributed September 1, 2022 to 1,258 providers in SDA 9
- Collected 315 responses (189 centers, 126 family child care providers)
- Results are statistically significant with 95% confidence and a margin of error of 5%

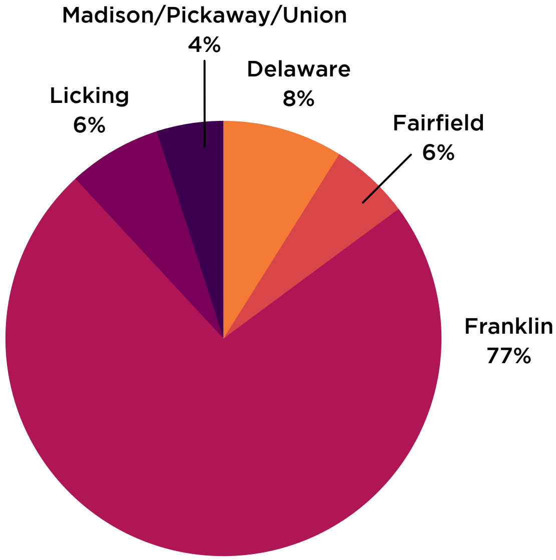
Objectives

- Quantitative data regarding current state of child care in central Ohio
- Qualitative feedback on challenges providers face
- A focus on tuition, staffing, enrollment, and Step Up To Quality

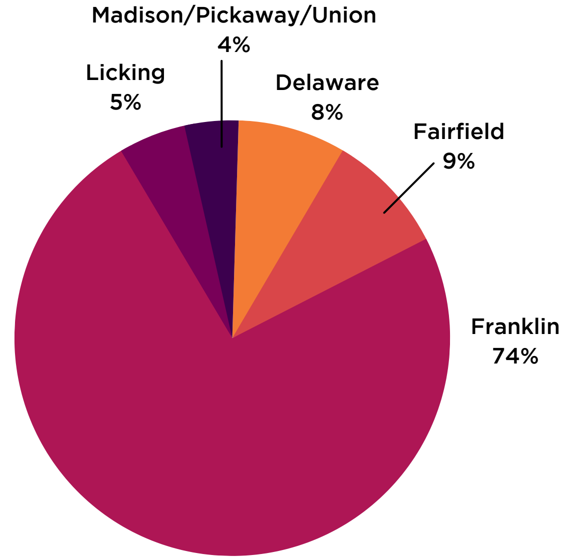
Representative Demographics of Survey Responses

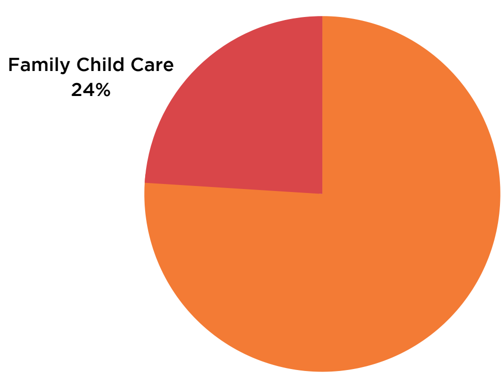
Survey responses are representative of the population of all central Ohio providers based on program location by county. Responses reflect a higher response rate of family child care (FCC) programs and a slight over-representation of programs providing Publicly Funded Child Care (PFCC).

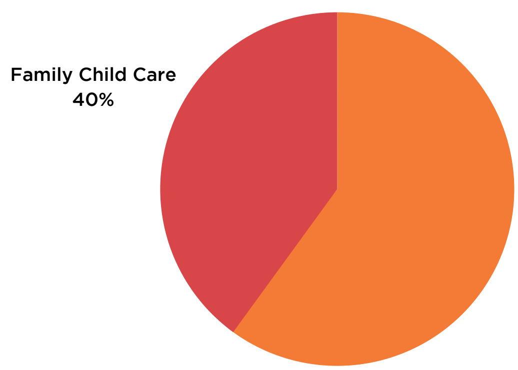
SERVICE DELIVERY AREA

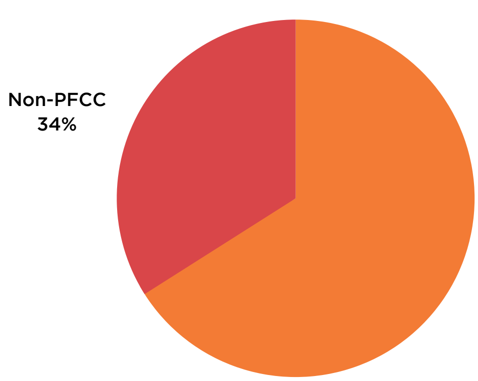


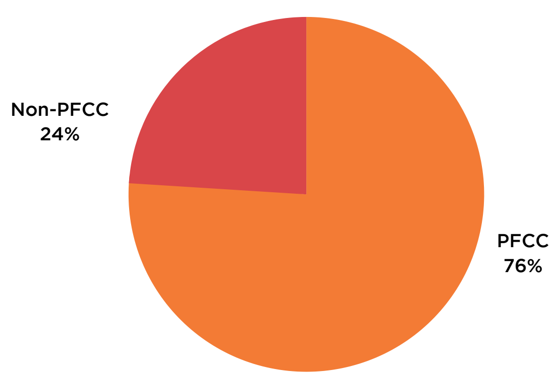
SURVEY RESPONSES











**Madison, Pickaway, and Union counties were combined for analysis due to small group size.*

Summary of Findings

High-level survey results by county for Service Delivery Area (SDA) 9.

- One in ten central Ohio providers (11%) are not confident that they will still be open within three months, an improvement over 2021 (17%).

Franklin County	Delaware County	Fairfield County	Licking County	Madison, Pickaway, and Union County
14%	4%	4%	0%	0%

- For half of providers in SDA 9 (50%), monthly revenue does not cover expenses (vs 56% in 2021).

Franklin County	Delaware County	Fairfield County	Licking County	Madison, Pickaway, and Union County
56%	25%	44%	35%	21%

- Enrollment has marginally increased, but is still depressed at 64% of total capacity in central Ohio (vs 62% of total capacity in 2021). Approximately 7,500 more children could be served if all respondents were operating at their maximum capacity.

Franklin County	Delaware County	Fairfield County	Licking County	Madison, Pickaway, and Union County
60%	73%	69%	72%	76%

- Four in five (81%) center-based providers in the region want to hire or have open positions (vs 50% experiencing staff shortages in 2021).

Franklin County	Delaware County	Fairfield County	Licking County	Madison, Pickaway, and Union County
82%	73%	76%	92%	78%

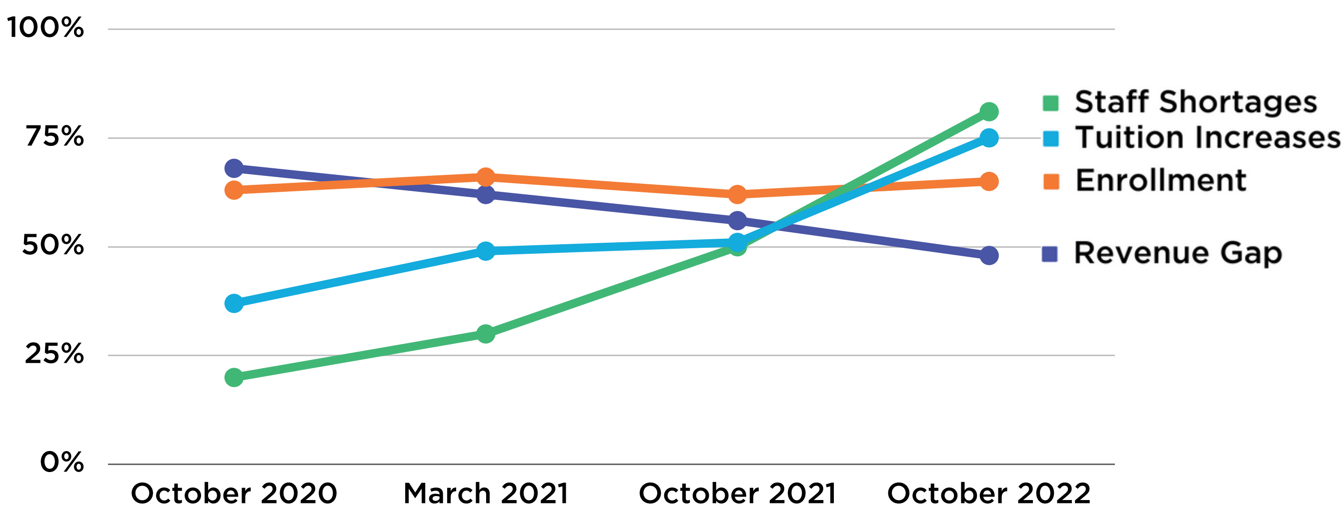
- More than half of all providers surveyed (55%) have had to raise tuition since September 2021 (vs 37% from July 2021 - September 2021). Moreover, 41% of providers who have already raised tuition plan on raising tuition again within the next 6 months.

Franklin County	Delaware County	Fairfield County	Licking County	Madison, Pickaway, and Union County
49%	71%	59%	53%	79%

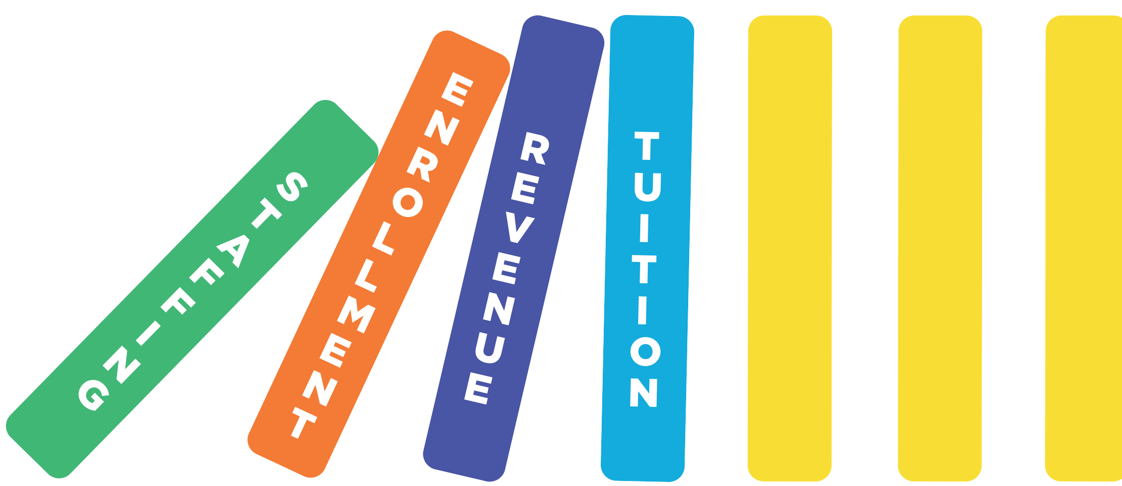
Slow Improvement, Troubling Trends

The data collected over the last two and half years shows signs of modest improvement in revenue and enrollment, but not an industry in recovery. The number of providers reporting a revenue gap has declined over time as temporary relief funding for child care increased. However, enrollment has yet to return to pre-pandemic levels, reflecting a mix of factors facing both families and the child care workforce. Spiking challenges related to staffing shortages and tuition hikes present a troubling picture of continued crisis.

Annual Comparison Chart (2020-2022)



The result produces a domino effect – not enough staff limits enrollment, which reduces revenue and causes tuition to rise – an unstable reckoning that shortchanges families, employers, and communities.



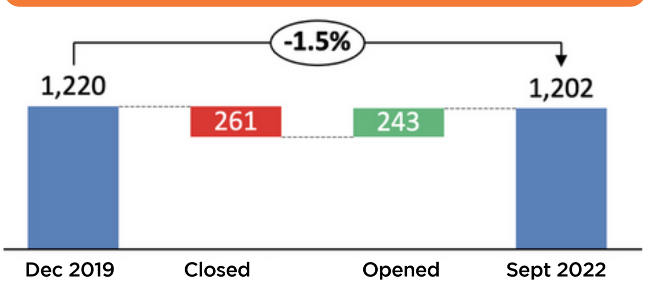
Closures and Capacity

Over time and with significant local, state, and federal relief, the child care sector is weathering the storm. As programs have closed, others have opened, reflecting slow improvement with mixed results. But the effect of these disruptions and fluctuations has broader implications for children, families, and providers. Administrative data curated by Action for Children tells a tale of two worlds of child care.

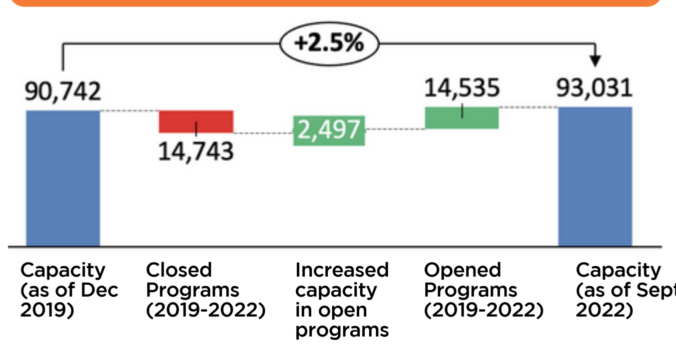
Fluctuations in Program Closures and Openings

In the last two years, 261 of 1,220 child care programs (more than one in five) permanently closed their doors. We also saw new providers start up, especially in 2021 and 2022. Over a 33-month period between December 2019 and September 2022, the net loss of child care programs in the region was 1.5%. Over the same period, licensed capacity actually increased by 2.5% overall, driven not only by new programs opening but also existing programs adding capacity for nearly 2,500 children. Importantly, these diverging numbers mask the disruption for children and families who have had to find new providers and for early childhood educators who lost their jobs when programs closed.

Change in Number of Providers



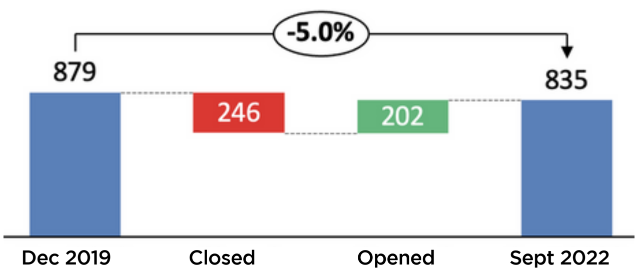
Change in Provider Capacity



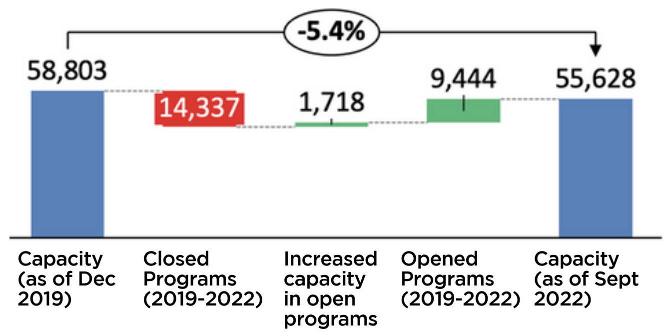
Access to Publicly Funded Child Care

A closer look at the data tells a more troubling story for children and families who rely on Ohio's Publicly Funded Child Care (PFCC) program to help afford child care. Since December 2019, the net number of programs participating in PFCC has decreased by 5%. Some programs with PFCC agreements have closed, while other programs chose to not continue or not enter into a PFCC agreement. As a result, the proportion of programs participating in PFCC dropped from 72.1% to 69.5% since December 2019, and the number of PFCC child care slots in central Ohio fell by almost 3,200. Fewer options for the families that face the greatest barriers to accessing care is a troubling trend that threatens to deepen inequities if left unchecked.

Change in PFCC Providers



Change in PFCC Capacity



Mixed Results

This at-best mixed picture does not portray a sector that's recovered. As we outline in this report, providers share continued troubling enrollment numbers and a significantly worsened staffing crisis. They clearly are taking account of the significant positive impact of public relief funding, and the story the data tells is not that we have returned to pre-pandemic conditions. Returning to 2019 numbers may give a sense of progress, but it is not the ultimate measurement of success. Even before the pandemic, Ohio families did not have access to enough affordable, quality child care to meet their needs.

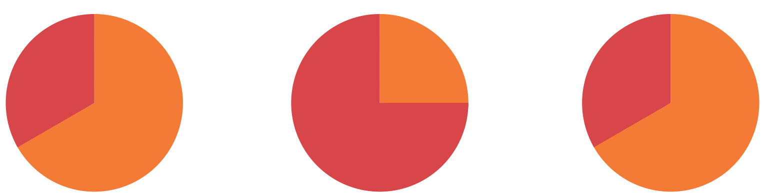
"The fact that I have a waiting list that goes out 2 years is an issue. I'm one of only three programs in my area that take PFCC, so parents needing help with child care literally have nowhere to go."

Enrollment

Child care programs have closed and opened, but enrollment has remained largely flat. Despite a modest increase since 2021, enrollment is still depressed at 64% of total capacity across central Ohio. If just those providers who responded to the survey were 100% enrolled, nearly 7,500 additional children could have access to child care. For central Ohio as a whole, the number is significantly larger.

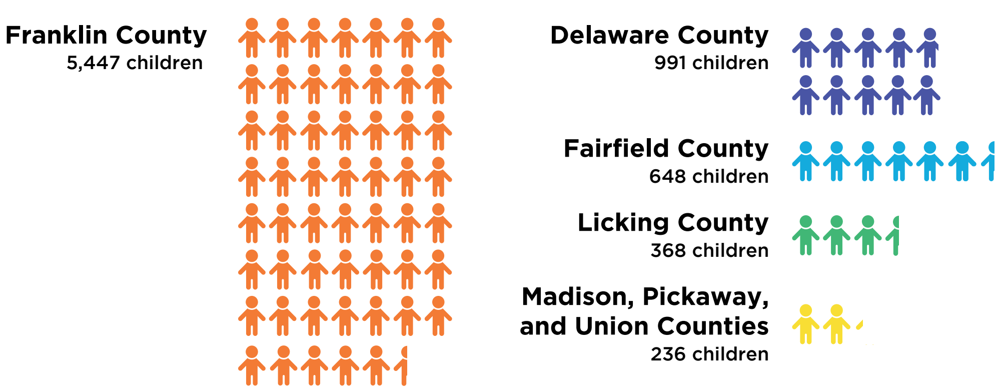
Among survey respondents, data shows that 26% are operating at less than half of their reported capacity. Reasons cited include a shortage of staff coverage, primarily among centers, and a lack of new enrollment – an issue experienced equally by centers and family child care providers.

Providers serving less than half of their capacity



Two-thirds are center-based programs | A quarter are multi-site programs | Two-thirds have a monthly financial gap

The chart below (each figure represents 100 children) illustrates how many additional children the providers surveyed could collectively serve at their programs if all available slots were to be filled.



"A challenge to enrollment is getting more people interested in working in child care and increasing public perception of child care as education and not babysitting."

"Many parents work from home; families are trying to save money find alternatives to avoid childcare tuition."

After two years of dealing with the effects of the COVID-19 pandemic, disrupted child care arrangements, and an unstable job market, enrollment continues to lag. In reviewing survey responses from providers around enrollment challenges, several intersecting themes emerged:

The cost of child care tuition and fees is a recurring issue, especially for families who make too much to qualify for PFCC, but still don't make enough to afford full time child care.

Programs who can't find enough staff to meet the demand for child care are often forced to waitlist children. Parents have no choice but to look for other options.

Due to the changing work schedules of parents, child care programs are finding it difficult to retain families when the parent's work hours no longer match the availability of care.

Getting approved for child care subsidies takes time -- time that families may not have. The timing mismatch can cause families and programs to miss out on enrollment.

Some families have not returned to child care because they're concerned with risk of illness or have made other arrangements such as leaving the workforce, changing their schedules, or changing providers.

Enrollment Counts

In Franklin County, half of children are not enrolled in any formal, out-of home early learning programs and fewer than 40% are ready for kindergarten. Increasing enrollment in high-quality, licensed child care programs means that more families in central Ohio can access the important early learning experiences children need. To achieve this, our work is two-fold: educating parents and other adults to recognize and value high-quality child care for young children and finding ways to make it more affordable for them. Failure to do so has financial implications for the child care sector and working parents, educational implications for children, and social implications for central Ohio's long-term progress.

Staffing

Nationally, employment in the child care sector has been slow to recover and remains down by 8.4% or 102,400 jobs when compared to February 2020. The situation in Franklin County is worse: child care employment is down 12.7% since 2019. Compared to last year, more child care programs are looking for employees, experiencing difficulty in attracting and retaining staff, unable to offer compensation at the competitive levels early childhood educators deserve, and have been forced to limit enrollment as a result.

Recruitment and Retention Have Worsened

In central Ohio, staffing challenges have intensified. Four out of five centers (81%) - up from 50% a year ago – reported needing staff, and we project that means about 1,985 additional early educators and support staff are needed in the region. The number of respondents saying they were fully staffed has also plummeted, ultimately impacting the supply of quality early learning experiences available to young children. In most cases, center-based programs in central Ohio are looking to hire one to two additional staff members, but nearly four in ten (36%) need three or more staff members.

"It is very difficult to find people who want to work in childcare. The demands for pay and time are increasing. Burnout is definitely an issue and it's hard to keep employees longer than six months to a year."

Compensation Continues to Constrain Child Care

Hourly wages for child care providers average just $10.65 statewide according to the Center for the Study of Child Care Employment. While that is above Ohio's minimum wage, it is far below the Living Wage MIT calculates is necessary for a family of three with both parents working, which is $17.61/hour. In addition to chronically low wages, providers face long hours, strenuous work, limited healthcare benefits, and a lack of recognition and respect. Without significant investment to increase the wages of early childhood educators, the staffing crisis is likely to worsen in a region with a strong and growing economy, creating a ripple effect for providers and families.

"My primary concern is always quality care for the children. Quality care is provided by qualified teachers. I am concerned that quality teachers are not remaining in the field."

Signing Bonuses: To meet recruitment challenges, child care centers turned to signing bonuses. Nearly two-thirds (58%) have attempted to offer signing bonuses in the previous 12 months, and almost four in ten (37%) are currently offering bonuses that average $598. In the heated Columbus-area economy, labor is in even greater demand and signing bonuses are just one of many factors that job seekers consider, including compensation, working conditions, and job status.

"The child care industry was barely sustainable pre-pandemic. With changes to the workforce and a highly competitive environment in regard to other industries, the draw to get new staff in the door is virtually impossible. Investments need to be made for the child care industry to even begin to be competitive, let alone be sustainable. Aid at the government level is absolutely necessary to increase staff wages and allow early learning centers to survive and grow."

Home-Based Child Care is Stretched Thin

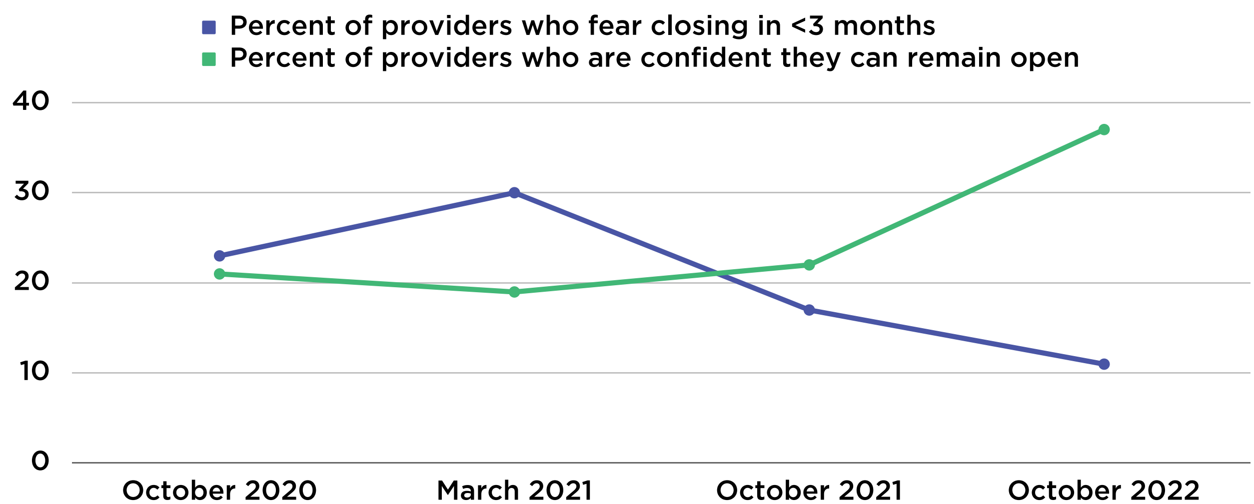
Family child care providers are at risk for burnout, and they want support. As small business owners in an isolating profession, these providers face unique challenges when it comes to staffing and compensation. Traditionally, family child care programs are run in a home by one person, almost all of whom are women and disproportionately women of color. While family child care providers occasionally employ an assistant (often a relative) or are supported by a substitute, they typically work alone. The result is that family child care providers wear many hats on a daily basis: business owner, educator, administrator, cook, nurse, sanitation worker, and so on. But while over 40% of local family child care providers report that they would like to hire staff to lighten the load, 43% of these providers shared that they cannot find someone and 78% said that cannot afford to hire someone.

Family Child Care Providers May Earn Less Than Minimum Wage: As small business owners, family child care providers' salaries are dependent on the economics of their neighborhoods. In the absence of public dollars to pay for the true cost of providing quality care, providers take home what parents are able to pay, minus their business expenses. This means that in many cases, family child care providers, who work incredibly long hours, do not even make minimum wage, despite the fact that they enable others to participate in the workforce. In fact, approximately 53% of family child care provider survey respondents reported that they do not pay themselves; of these providers, 64% identify as Black or African American, raising concerns about the ways in which compensation challenges in family child care perpetuate the racial wealth gap in our region.

Revenue

Revenue shortfalls are both a cause and an effect of systemic problems in the child care sector. The share of providers reporting monthly losses has decreased over the past year, from 56% to 48%. But when considering the temporary relief programs driving this improved outlook, it is clear that while the progress is notable, it is far from reassuring.

In the last year, we have seen a trend in the right direction as fewer providers are reporting a fear of impending closure, and more are expressing confidence in their ability to remain open. Our most recent survey shows that the percentage of programs now reporting that they are not sure they will remain open for more than three months is 11%, the lowest level since the pandemic began. Conversely, 37% of programs are confident that they will remain open indefinitely without additional help.



However, the improvement in revenue and provider confidence coincides with reported increases in tuition and a significant influx of pandemic-era federal relief funding for child care—neither of which are sustainable. Families already struggle to pay for child care, and relief funding is temporary. In addition, recent improvements in revenue have not been experienced equally across child care settings; 61% of family child care providers report monthly financial losses (compared with 42% of centers) and more than half (59%) of these family child care providers do not even allocate a salary for themselves.

Pandemic Relief Funding

Since 2020, three separate federal relief measures have included funding for child care:

- Coronavirus Aid, Relief, and Economic Security Act (CARES Act), March 2020
- Coronavirus Response and Relief Supplemental Appropriations Act (CRRSA), December 2020
- American Rescue Plan Act (ARPA), March 2021

Ohio began revising policies and making fiscal decisions to support child care beginning in March 2020, and in 2021 and 2022, Governor Mike DeWine announced a total of $800 million in stabilization grants for child care through ARPA.

In addition, local governments have been able to direct a portion of the federal relief funding under their authority to child care. In August 2020, the City of Columbus and the Franklin County Board of Commissioners joined forces to launch the Columbus and Franklin County Child Care Recovery and Stabilization Grants, totaling $8.2 million. In 2021 and 2022, the City and County again joined forces to target nearly $15 million of their ARPA State and Local Fiscal Relief Funding to support child care. With the support of public partners, Franklin County RISE has provided child care scholarships and funds for signing bonuses, program incentives, and Emergency Rental Assistance for child care workers through Action for Children.

"Through the ARPA grant, I have been able pay ongoing costs such as water, gas, mortgage and rent, insurance and electricity bills. This grant has had a lot of impact on my program to stay open. If not for the grant, I should have closed by now because my monthly expenses have increased and are more than my monthly payment."

"The RISE funding has helped us cover expenses such as utilities, needed art supplies, and needed classroom materials."

"RISE has helped a family in my care. I am happy to see a program who cares about the families who make just over the amount of being denied for PFCC."

Temporary Relief for a Chronic Problem

This combination of relief measures has been a much-needed step in the right direction – but all of the funding, whether authorized by state or local government, must be liquidated by September 2024. Many providers, aware of this and of the broken child care system, are wondering “what happens when the money runs out?” At the end of the day, when a child care business cannot consistently make ends meet, there are cascading consequences. Revenue loss affects staff recruitment and retention, which in turn limits enrollment, forces unsustainable tuition increases for parents, and ultimately threatens a program’s ability to keep its doors open.

"We have been able to offer bonuses to staff, offer higher starting wages, and provide classroom management support with the grant money. However, we are cautious to remember that once the funding is spent, we will need to be able to support the operating level we have reached."

Tuition

Faced with revenue losses from mounting costs and relatively flat enrollment, providers are resorting to the only option they see available to them -- raising tuition and fees. Across central Ohio, the share of providers who have had to raise tuition has increased from 37% in 2021 to 55% this year. For parents and guardians who have shouldered the cost of child care for years with little to no help, the intensifying pressure is untenable. Without the investment of government, communities, and businesses to make quality child care affordable, our youngest learners and their child care teachers will continue to pay the price.

Child care tuition is going up across all seven counties, with the most drastic increases reported in the suburban and rural counties. In addition, 54% of providers plan to increase tuition again before December 2023. Of these providers, 73% plan to increase within 6 months (between October 2022 - March 2023), and 17% plan to increase tuition within 3 months (between October 2022- December 2022).

Central Ohio providers reporting tuition increases (by county)

YEAR	Franklin County	Delaware County	Fairfield County	Licking County	Madison, Pickaway, and Union County
OCT 2022	51%	71%	64%	53%	79%
OCT 2021	33%	62%	39%	44%	36%

Providers also reported a tension between guidelines in the Publicly Funded Child Care (PFCC) program and equitable access to quality child care. Child care paid for in whole or in part through PFCC cannot be priced any higher than a provider's usual rates charged to "private pay" families. It also is limited to families with incomes below 142% of the Federal Poverty Level, or a little more than $31,000 for a family

"The PFCC rates aren't increasing enough to be sustainable. I am afraid that I will not be able to continue to operate properly and care for children with lower incomes because the rates aren't sufficient."

of three. For families with incomes above that, assistance to cover the mounting costs of tuition (such as the child care affordability scholarships that are part of Franklin County RISE) is limited. Moreover, for programs located in particularly low-income neighborhoods, or with a particularly high percentage of enrollment paid through PFCC – in short, where the market is most broken – ithere is little room to raise tuition to keep up with rising costs.

Of providers who reported having a monthly financial gap, we found that:

52% **have increased their tuition in the past year**

59% **plan to increase their tuition in the next year**

36% **have already increased tuition and plan to increase it again**

Families who already often struggle to pay for child care, cannot shoulder the rising cost of child care on their own. In Franklin County, annual tuition for a preschool child enrolled in a child care center averages $13,100, far above the state and national averages calculated by Action for Children's national association, Child Care Aware of America. And while families are dealing with rising costs across the board due to inflation, increases in the price of child care have exceeded the average annual rate of inflation for the past three years.

"Most of my children are in the PFCC program and I feel their reimbursement rates have always lagged FAR behind the private pay rates. The RISE program is a ray of light for many families and I hope that in the future those spaces can be increased per program. My concern is, after the pandemic, the funding will go away and I will be forced to close down due to low reimbursement rates from PFCC."

"My biggest concerns for the future of child care in central Ohio is that children are not getting equitable learning opportunities. Families without child care due to PFCC income guidelines and ratios force providers to turn away families in need of care."

For parents and guardians, these prohibitive costs often come at a time in their lives when they have the least amount of disposable income, forcing them to either sacrifice quality to find care that fits within their budget or leave the workforce entirely to care for their children. Surveyed providers most frequently reported the cost of tuition as a barrier to both enrolling and retaining families; and while local efforts have helped to lessen the costs for several hundred families in Franklin County, far more investment is needed to bridge the gap for all families across central Ohio.

"The biggest fear I have is being forced to close. There is no way our market will be able to bear much higher tuition costs in order to keep up with the level of inflation or hourly/annual salary expectations."

Sharing the Burden

Without some form of financial intervention, the tuition data we have gathered here paints an unsustainable picture for families and providers. It is imperative that businesses and government entities step up and share the cost, ensuring that children and families can access high quality care and child care providers are compensated competitively and fairly for their important work. The success of young children, families, child care providers, and the broader economy depends on our ability to alleviate cost pressures associated with child care.

"Being in a rural community, most families do not qualify for PFCC but struggle to pay costs for child care, especially as inflation continues."

Survey Spotlight: Step Up To Quality

In addition to the staples of the Central Ohio Child Care Provider Survey, this survey looked at participation in Step Up To Quality and how recent changes to the program have affected providers' experiences. The Step Up To Quality (SUTQ) rating system sets the standard for quality child care in the state of Ohio. While SUTQ has evolved over the years, it remains a crucial tool to help parents compare programs to find the best care while supporting providers in offering the high-quality early learning experiences children need.

Background

In the 1990s, states developed new quality rating and improvement systems to standardize and improve the quality of child care in their states. In 2006, Ohio piloted its own version, called Step Up To Quality (SUTQ), which assigned child care programs "star ratings" based on four different domains of quality. A 2010 grant allowed SUTQ to expand statewide, transforming it from a voluntary program to a standardized requirement for child care programs seeking public funding. This change allowed families, private and public funders, and the state itself to understand and measure differences in program quality across diverse settings and funding sources. Despite the challenges of a pandemic, providers in central Ohio and around the state successfully met this requirement in September 2020, ensuring that all children received access to high quality care.

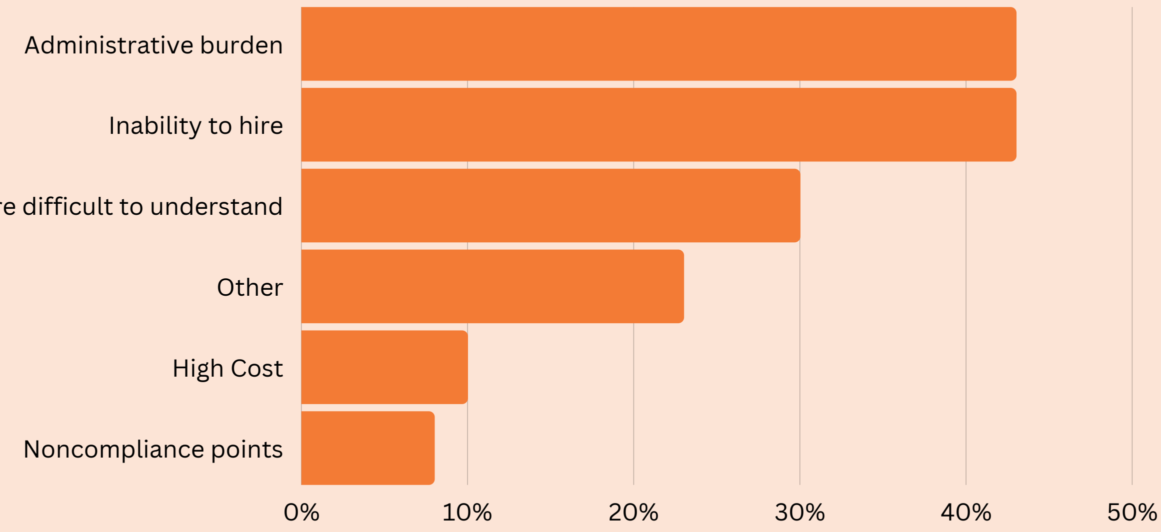
Step Up To Quality Today

The Ohio Department of Jobs and Family Services (ODJFS), which oversees Step Up To Quality, made several administrative changes to the program in April 2022, including reducing paperwork and implementing a continuous rating. Provider sentiment indicates that recent changes made to SUTQ may address commonly cited barriers to participating in the program.

A little more than two in five providers (43%) told us that the administrative burdens have been a difficulty in participating in SUTQ, but just as many (43%) pointed to the inability to hire qualified staff. Another 10% cited high costs.

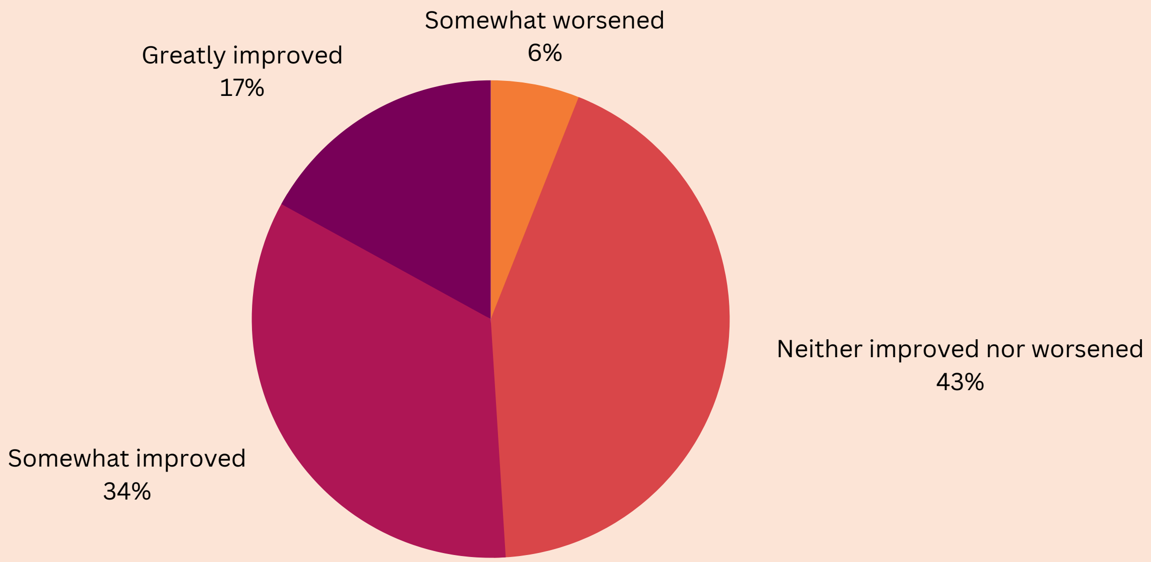
For programs that do not participate in SUTQ, the top reasons cited for not doing so are their perceptions of the amount of paperwork involved (66%), the lack of added benefit to attract more families to their child care program, and the fact that a SUTQ rating is not required for programs that don't receive public funding.

Difficulties experienced with SUTQ (n=235)



Significantly, more than half of participating providers (51%) said the modifications to SUTQ introduced by ODJFS in April 2022 have somewhat or greatly improved their experience with the state's quality rating and improvement system.

Provider impressions of recent changes to SUTQ (n=235)



For more information about Step Up To Quality, visit https://www.actionforchildren.org/sutq

What Must Be Done

We are at a critical inflection point. Central Ohio is experiencing tremendous economic growth. At the same time, the child care industry, which underpins the workforce of today while preparing the workforce of tomorrow, is undervalued, underinvested in, and unsustainable. To ensure that our region is prepared to meet this moment, we must build on the strengths of the child care sector and reverse the troubling trends outlined in this report by:

Investing in the early childhood workforce.

Without the early childhood workforce, there is no child care. We are seeing this play out in real time in central Ohio. Across the region, providers are struggling to recruit and retain staff as a result of low wages and long hours, thereby reducing capacity and threatening additional child care program closures. Child care providers who remain in the field are burnt out. We need to address the compensation crisis now by fighting for pay parity with public school teachers, coupled with the comprehensive benefits, professional growth opportunities, and supports (like mental health services) that make child care jobs attractive in a competitive economy. We must reward providers for the difficult, skilled, and important work that they do in a way that works across child care settings, recognizing the unique compensation challenges in family child care.

Investing in access for families.

It is not possible to stabilize the child care sector without ensuring that families can access care. And one of the biggest drivers of access is affordability. But without needed public funding, child care businesses are forced to raise tuition to combat staffing, enrollment, and revenue challenges, meaning fewer and fewer families can pay for child care without assistance. We need significant, sustained investment in PFCC so that timely, sufficient financial support is available to all families who need it. We also need supports for families who earn too much to access the limited PFCC program, yet still too little to afford rising child care tuition – something the Franklin County RISE scholarships are addressing. In addition, we need to explore other facets of access, including the availability of care during nontraditional hours and care that reflects families' language and culture. This will only become more important as projected economic growth in the region will likely attract a larger and more diverse workforce with a myriad of child care needs and preferences.

Investing in quality.

Children deserve access to the high-quality care that builds the foundation for success in school and in life. Child care providers are deeply committed to offering that care. Our job is to ensure adequate funding and resources to support child care programs on their quality journey; reduce barriers to quality; compensate providers fairly for the high-quality care they provide; and educate families about what quality looks like across child care settings so they can make the best decisions for their children. Step Up To Quality, Ohio's quality rating and improvement system, is our main vehicle through which to do this. Recent changes to SUTQ have resulted in improvements in providers' experiences with the system. We must build on this positive momentum and continue partnering with providers, parents, and ODJFS to ensure equitable access to quality for every child care program and every family.

All of this can and must be done in tandem. Our survey data confirms one thing we already knew—that every part of the child care system is connected, and changes in one area create a domino effect in others. By taking a comprehensive approach to solving child care, rooted in the voices of the providers and families closest to the challenges we face, we can create a central Ohio where child care providers, the children and families who rely on them, and our economy thrive.

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Continued Support

You can continue to support Action for Children's advocacy efforts, ensuring our vision that all children have opportunities for quality early learning experiences to prepare them for success in school and life by sharing this document with your local state and national government representatives to encourage them to invest in child care.

Action for Children uses this data to guide our programs and advocacy efforts. Your monetary support allows us to continue this effort.

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