

Action for Children



# TAKING A TOLL

## CENTRAL OHIO CHILD CARE PROVIDER SURVEY REPORT

November 2021



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## 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 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.

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## Methods

- Online survey distributed September 20, 2021 to 1,188 providers
- Collected 333 responses (243 centers, 90 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
- Qualitative feedback on challenges providers face
- A focus on staffing challenges, enrollment, and the impact of COVID-19

## Representative Demographics of Survey Responses

Survey responses are representative of the population of all Central Ohio providers based on program type (center vs. family child care) and location (county). Responses reflect a slight over-representation of programs providing publicly funded child care (PFCC).



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

# Summary of Findings

## Results from a high level Service Delivery Area (SDA) and by County.

- 17% of providers are not confident that they will still be open within three months

Franklin County	Delaware County	Fairfield County	Licking County	Madison, Pickaway, and Union County
20%	41%	18%	6%	9%

- For more than half of providers (56%), monthly revenue does not cover expenses

Franklin County	Delaware County	Fairfield County	Licking County	Madison, Pickaway, and Union County
64%	38%	32%	44%	36%

- Enrollment is depressed at 62% of total capacity (23% below the industry standard)

Franklin County	Delaware County	Fairfield County	Licking County	Madison, Pickaway, and Union County
60%	72%	58%	64%	65%

- 50% of center-based providers are experiencing staff shortages

Franklin County	Delaware County	Fairfield County	Licking County	Madison, Pickaway, and Union County
44%	45%	18%	61%	32%

- Over one third (37%) have had to raise tuition since July 1, 2021

Franklin County	Delaware County	Fairfield County	Licking County	Madison, Pickaway, and Union County
33%	62%	39%	44%	36%

# Child Care Providers Continue to Struggle

Eighteen months into the COVID-19 pandemic, nearly one in five child care programs (17%), with capacity for up to 11,000 children, anticipate closing in the next three months without additional support. While this number has fluctuated throughout the pandemic and varied across the Central Ohio region, it's a stark reminder that the vital child care sector is in jeopardy.

## Challenges facing providers

**Staffing:** Finding the necessary staff qualified to teach, care for, and guide young children looms as one of the largest barriers to enrollment – and thus to working parents' access to care. 50% of centers are experiencing staff shortages; 47% of those are looking to fill 3-6 staff positions. Issues persist across the board, with difficulty hiring new staff (79% of programs) and finding substitutes (61%) as the top two concerns. Notably, one out of five (21%) family child care providers, who typically operate alone in their home-based program, report challenges finding substitute or support staff.

These regional results mirror national trends. Data from the U.S. Department of Labor show that 126,700 workers have left the child care field since the pandemic began. Local data lags, but some estimate the child care workforce in Columbus may have shrunk by nearly 20% in the first year of the pandemic. Programs of all types across the region report that they lack the resources to compete with other industries for talent given current labor market conditions.

**Enrollment:** Since the initial closures of child care programs and schools in the spring of 2020, enrollment has continued to be depressed. Survey respondents report that enrollment is 62% across the region, far below the industry standard of 85%.

"While other industries have increased pay to attract workers, we can't do that because we are 85% PFCC and can not get a significant increase in tuition payments.

Without increased funding for children's tuition, I am unable to pay my staff more and can't attract new staff. Without more staff, I can't increase my enrollment to bring in more money. A vicious cycle that is even more drastic since the pandemic began."



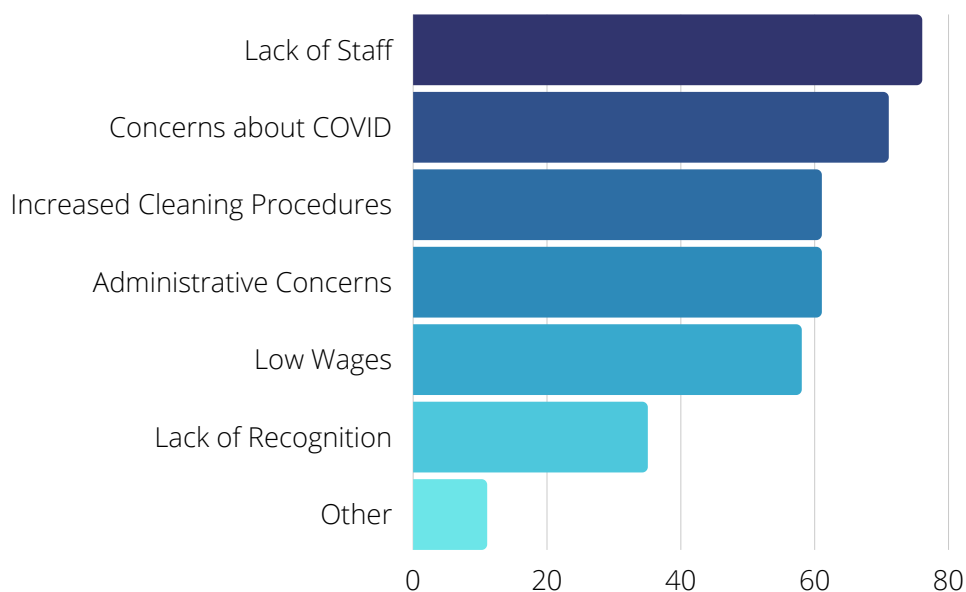
**Revenue:** With enrollment depressed and the costs of operating under pandemic conditions rising, most child care programs in Central Ohio are under water. 56% of programs report that revenue is not sufficient to cover monthly expenses, and well over half of child care centers with shortfalls (68%) report monthly gaps of \$5,000 or more.

More providers are turning to increased tuition as a solution, making it harder for families to afford access to care. 37% of programs say they have increased tuition since July 1, 2021, and an additional 18% report planning to do so in the next three months.

**Burnout:** The pressure of navigating all of these challenges is taking a toll on the child care workforce. 76% of providers are reporting burnout, with the biggest reasons being lack of staff and concerns about COVID-19.

While the pandemic remains a major issue, many of these concerns are closely interwoven. Lack of recognition for the child care workforce drives low wages, which in turn, makes finding staff a greater challenge. Without a framework of respect, recognition, and reward, the root of the concerns leading to burnout are likely to continue, and the resulting unsustainable cycle will persist.

**Which factors are contributing to burnout at work with you/staff? (n=254)**



## 202 programs closed

since February 2020,  
totaling 16% of  
programs in the  
Central Ohio region

"Expenses for everyday supplies have skyrocketed, but pay has not changed. Many [staff] even take home less [pay] due to restricted hours at times."



"Teachers and administration are tired - many have been working long hours because finding qualified applicants has been extremely difficult. Without the staff we need, it may be required that we disenroll families, which is a terrible possibility."





## A caveat: challenges are not experienced equally.

Child care is local – it's in your neighborhood, next to your workplace – and conditions can vary. Where a program is located, which families it serves and staff it can afford, can all affect enrollment, staffing, and revenue. While the pandemic has challenged all providers, not all are facing the same crises.

Staffing, enrollment, operating expenses, and tuition vary across the Central Ohio region. Financial difficulties bear more heavily on independent family child care providers, programs in Franklin County with its tighter labor market, and programs that continue to struggle with enrollment.

When evaluating which providers are more likely to not have enough revenue to cover expenses:

**2x**

more likely to be a  
**Family Child Care**

**3x**

more likely to be in  
**Franklin County**

**5x**

more likely to have  
**low enrollment**

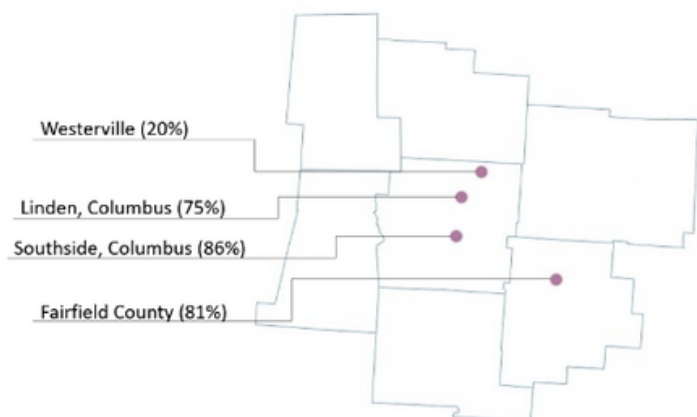


"As a home daycare provider it's been hard to afford all the changes and updates required out of pocket with no financial assistance."

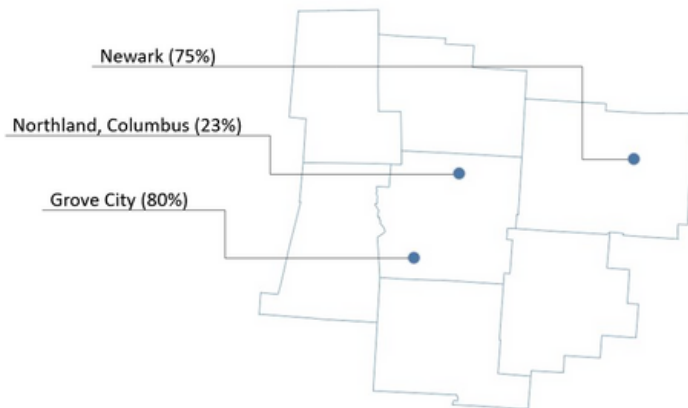
### Enrollment, Waitlists, and Tuition

The challenges facing child care programs directly affect the working families that rely on child care to go to work, making it harder to find and afford the care that's available.

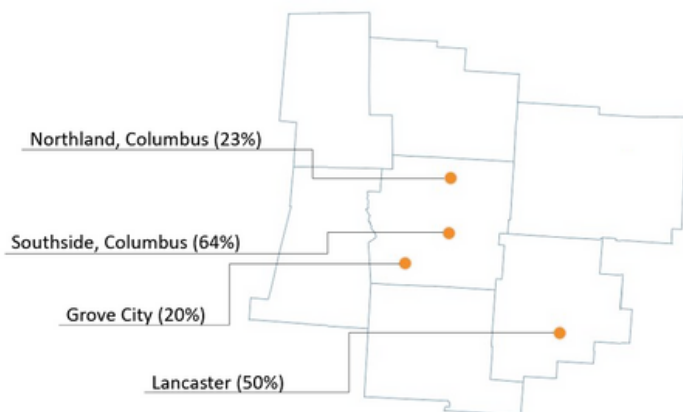
50% of programs across the region have had to lower enrollment because of a lack of staff, though this appears to be a larger problem in Fairfield County where the rate is 81%. This is a common issue facing areas in Franklin County such as Southside Columbus (43206) at 86% and Linden (43224) at 75%, but not as prominent in Westerville (43081) where only 20% of providers reported lowering enrollment due to a lack of staff.



In Central Ohio, 57% of programs have had to waitlist families. However, in hotspot areas such as Newark (43055) and Grove City (43123), more than 75% of providers are having to waitlist families. Meanwhile, in the Northland area of Columbus (43229), the waitlist rate is much lower at 23%.



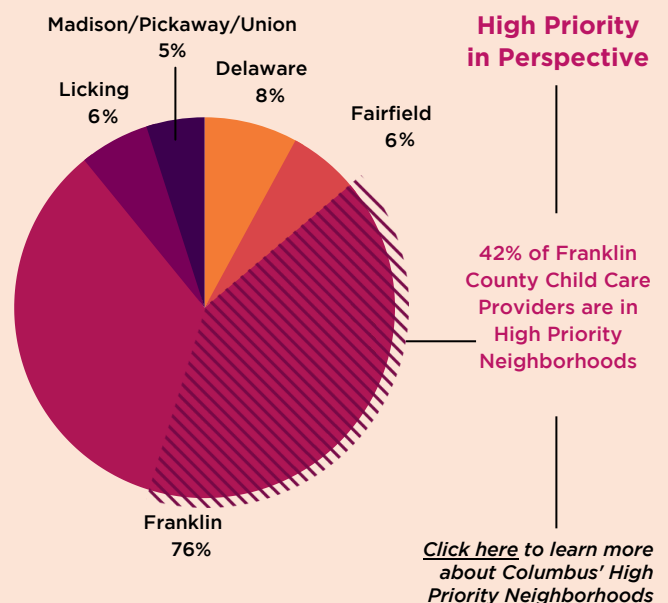
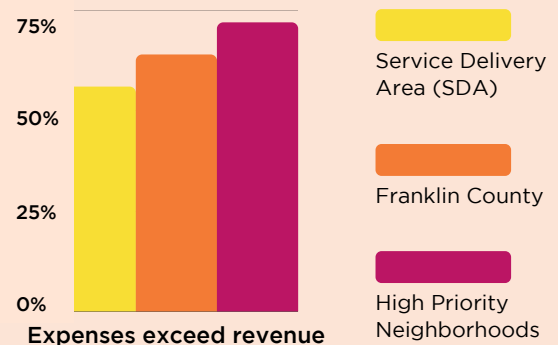
Nearly 40% of programs in Central Ohio have raised tuition since July 1st, 2021. These rates go as high as 50% in Lancaster (43130) and up to 64% in the Southside of Columbus (43206). Comparatively, in Grove City (43123) the rate of tuition increases sits at 20%, and at 23% in the Northland area of Columbus (43229).



Further analysis of provider responses showed that factors such as program size and tax status (for-profit vs. non-profit) did not have any significant impact on enrollment, tuition, or staffing.

## A Closer Look: Columbus' High Priority Neighborhoods

Over 40% of all licensed child care providers in Franklin County are located within one of eight High Priority Neighborhoods in Columbus, Ohio, where measures of unemployment, homelessness, graduation rates, health coverage, food access, crime indicate that residents face greater barriers to opportunity. Challenging conditions and social determinants in these neighborhoods also affect access to quality child care and exacerbate existing difficulties for providers.





# Returning to Child Care

Child care providers continue to be ready to take on the responsibilities of keeping children safe in the classroom. They've worked with public health authorities, adapted to state regulations that evolved with the pandemic, and risen to the occasion to meet parents' changing needs and concerns throughout the crisis.

## Safety First

Though mask policies vary from location to location, only 7% of providers reported not having a mask policy. Mask compliance issues are also rare among both staff (4%) and families (7%). Two out of three providers reported either requiring or encouraging employees to be vaccinated. 37% of providers reported having a COVID case since July 1, 2021, and per protocols and licensing rules, 75% of those with positive cases have had to close at least part of their facility during that time period.

## Hopeful Signs

Providers shared that a variety of factors have helped them remain open and safe, including greater clarity about safety regulations, procedures and requirements through training and information sharing, donations of safety supplies and financial support such as Hero Pay, PPE loans, and related grants.

Other hopeful signs include an increase in the availability of COVID-19 vaccines, which are proven to reduce the risk and severity of infection from COVID-19 and provide greater protection for child care teachers, staff, and the community.

## Providers want families to know...



"My staff has stepped up during this time. They have worked longer hours, gone above and beyond their job descriptions, and have had their pay reduced. They do this because of their love for our students."

"We have been doing our absolute best to provide engaging activities and care for children while keeping everyone safe. It isn't easy, but it is our priority. Everyone working together will make it that much better."



# Where do we go from here?

## STEPPING UP TO STABILIZE CHILD CARE

Immediate assistance is needed to stabilize child care in our communities. Families need resources that allow them to afford access to care, and providers need help to recruit and retain qualified staff in a competitive labor market as well as recoup financial losses.

**Action for Children is committed to collaborating with public and private sector partners at the local and state levels to get help to where it is needed.**

## CHANGING COMMUNITY PERCEPTION

In order to move child care forward, it's vital for society to understand that child care is an essential service whose professional educators are engaged in the vital work of brain building -- not "babysitting." The community's failure to appreciate this contributes to burnout among this workforce on which the rest of the workforce depends.

**Action for Children is committed to raising awareness and campaigning for greater respect, recognition, and reward for all early childhood educators.**

## RETHINKING THE MARKET STRUCTURE

Long term change in how we pay for and provide child care is required. Relying wholly on a dysfunctional market that asks parents -- typically at the lowest-earning point in their lives -- to front the high cost of care doesn't work for children, families, schools, or employers. Congress must pass the Build Back Better Act, a comprehensive birth-to-five plan that includes paid leave, universal access to quality child care and pre-kindergarten.

**Action for Children is committed to bringing together and amplifying the voices of Central Ohioans in support of this historic legislation.**

**Action for Children**



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and made possible by the support of  
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