



**Community Partnership  
of Southeast Missouri**

# Cape Girardeau County Community Team Data

# Meeting #2

## Community Data Overview

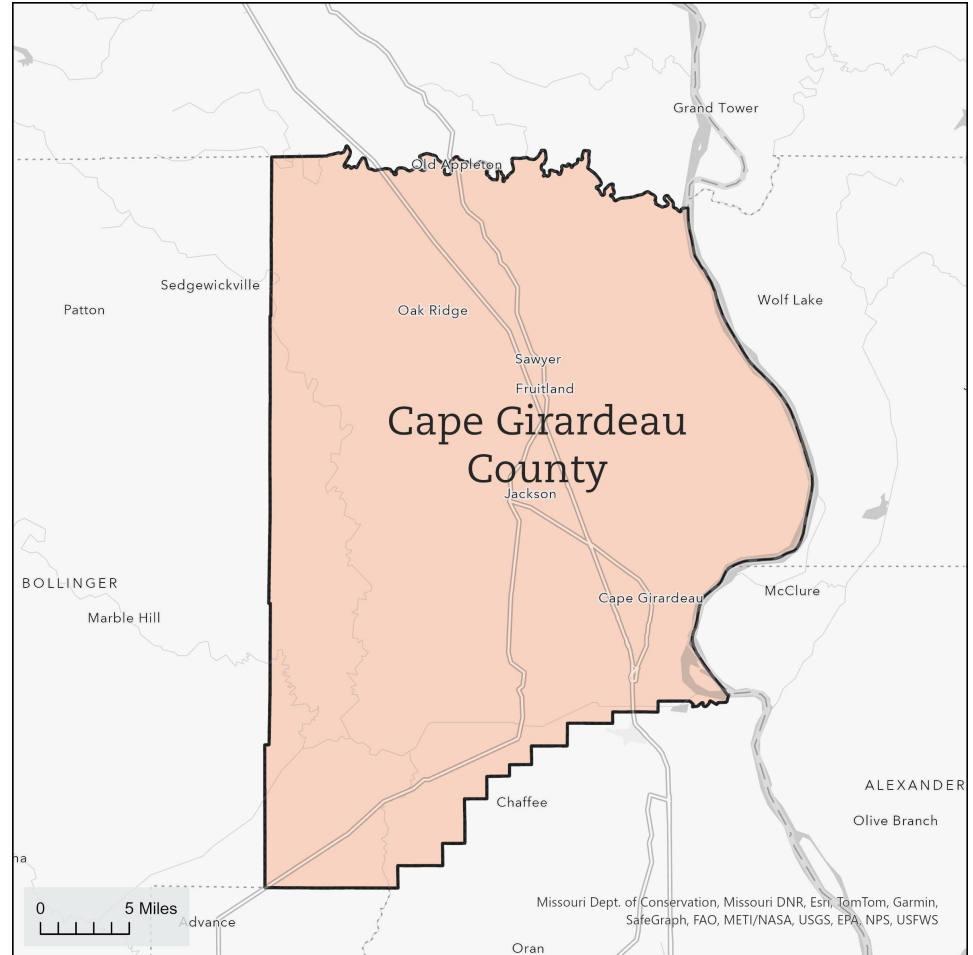
July 29, 2024

# Agenda

1. Welcome
2. Data overview
3. Survey insights
4. Fiscal mapping & Cost modeling
5. Discussion
6. Next steps

# Study Area

## Cape Girardeau County



# Phase I: Research & Community Engagement

- Community needs assessment - IFF
  - Supply and demand analysis
- Stakeholder survey
- Fiscal mapping and cost modeling

# Data Overview

# Data Sources

- Provider information
  - Child Care Aware list of providers
  - Local contacts for HS/EHS slots
  - Missouri DSS Block Grant Child Care Monthly Management Report for State Subsidy data
- Family need and workforce characteristics
  - American Community Survey 5-year estimates
  - Esri demographic estimates
  - Bureau of Labor Statistics Longitudinal Employer-Household Dynamics (LEHD)

# Key Findings

- The study area needs more than 1,000 additional slots, and nearly all of those additional slots are needed for Infants/Toddlers.
- There are no Early Head Start slots.
- More than 300 additional Head Start slots are needed.
- Pre-K capacity is meeting the needs of the community.
- Only about 10% of the children who are eligible for the state subsidy program are successfully accessing it.
- From 2017 to 2022, the number of kids ages 0-5 has decreased by 3%. However, the number of kids in households with all parents working is up 14%.
- Over the same time period, the county population as a whole is up slightly while there has been a 19% increase in the number of people who identify as a race or ethnicity other than “White, Not Hispanic”.



# Supply: ECE Provider Data

- Licensed (and regulated, license-exempt) capacity
- Estimated capacity for age groups 0-2 years, 3-5 years, and Pre-K
- Facility type
- Program(s) and Accreditations

# Provider Information

NUMBER OF HOME-BASED PROVIDERS	NUMBER OF CENTER-BASED PROVIDERS	NUMBER OF GROUP HOME PROVIDERS	NUMBER OF ACCREDITED PROVIDERS
5	18	8	1

This table does not include Pre-K programs

# Provider Capacity

	NUMBER OF SLOTS, TOTAL	NUMBER OF HEAD START/EARLY HEAD START SLOTS	NUMBER OF STATE SUBSIDY SLOTS	NUMBER OF ACCREDITED SLOTS
INFANT & TODDLER (BIRTH-2 YEARS)	867	0	67	86
PRESCHOOL (3-5 YEARS)	1,881	76	64	82

Preschool (age 3-5 years) includes Pre-K programs

# Demand: Family Need Data

- Total number of children 0-5, with Pre-K, 0-2, and 3-5 age groups broken out
- Estimated number of children qualifying for state subsidized care
- Estimated number of children qualifying for Early Head Start and Head Start programming
- Demand for care is based on 70% of total kids

# Family Need

	NUMBER OF KIDS WHO NEED CARE	NUMBER OF KIDS IN POVERTY ELIGIBLE FOR HEAD START/EARLY HEAD START	NUMBER OF KIDS ELIGIBLE FOR STATE SUBSIDY
INFANT & TODDLER (BIRTH-2 YEARS)	1,888	397	626
PRESCHOOL (3-5 YEARS)	1,920	398	629

This table is based on the assumption that 70% of kids need care

# Gap in Total Slots

	NUMBER OF SLOTS, TOTAL	NUMBER OF KIDS WHO NEED CARE	GAP IN SLOTS, TOTAL	PERCENT SERVED
INFANT & TODDLER (BIRTH-2 YEARS)	867	1,888	-1,021	45%
PRESCHOOL (3-5 YEARS)	1,881	1,920	-39	98%
PRE-K (4-5 YEARS)	994	647	347	154%

This table is based on the assumption that 70% of kids need care  
Pre-K (4-5 years) slots and kids are a subset of Preschool (3-5 years) slots and kids

# Gap in Head Start & Early Head Start Slots

	NUMBER OF HS/EHS SLOTS	NUMBER OF KIDS ELIGIBLE FOR HS/EHS	GAP IN HS/EHS SLOTS	PERCENT SERVED
INFANT & TODDLER (BIRTH-2 YEARS)	0	397	-397	0%
PRESCHOOL (3-5 YEARS)	76	398	-322	19%

This table is based on the assumption that 70% of kids need care

# Gap in State Subsidy Slots

	NUMBER OF STATE SUBSIDY SLOTS	NUMBER OF KIDS ELIGIBLE FOR STATE SUBSIDY	GAP IN STATE SUBSIDY SLOTS	PERCENT SERVED
INFANT & TODDLER (BIRTH-2 YEARS)	67	626	-559	11%
PRESCHOOL (3-5 YEARS)	64	629	-565	10%

This table is based on the assumption that 70% of kids need care



# Family Characteristics Data and Trends

- Household income
- Households with all parents working
- Total children aged 0-5
- How have these characteristics changed over time?

Data source: US Census Bureau, American Community Survey 5-year estimates

# Household Characteristics

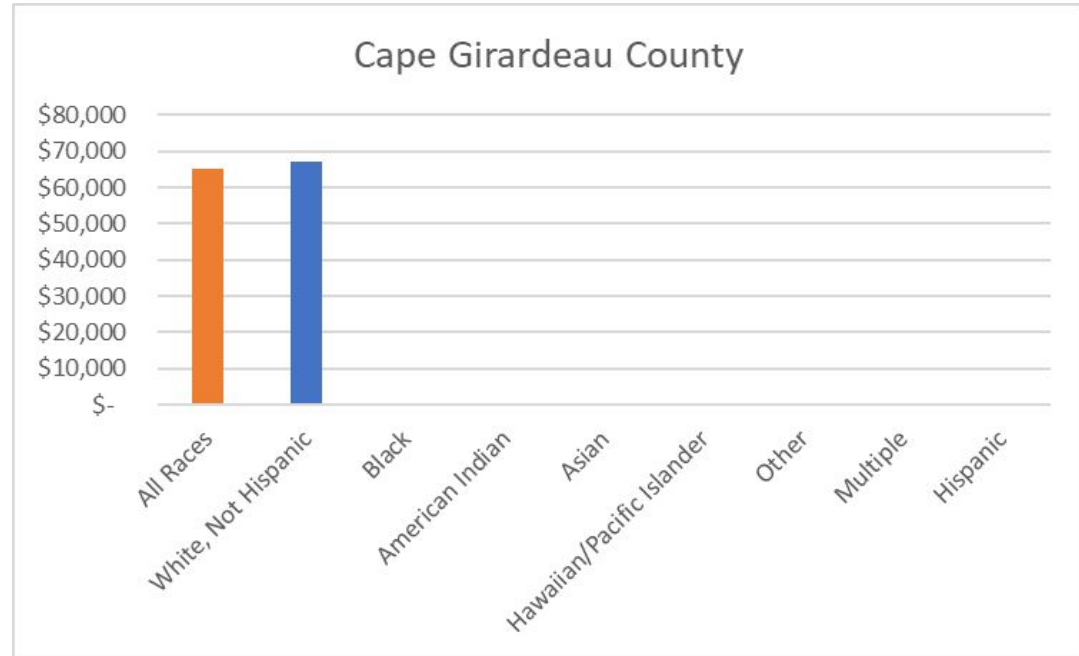
Median Household Income			Population 0-5			Children 0-5 with All Parents Working		
2017 <small>(IN 2022 DOLLARS)</small>	2022	% Change	2017	2022	% Change	2017	2022	% Change
\$59,347	\$65,070	10%	5,243	5,075	-3%	3,475	3,948	14%

# Median Household Income, 2022

## by Race or Ethnicity

Differences in MHI are an important consideration when planning for affordable ECE.

While incomes for most Race/Ethnicity groups are too small to report with confidence, the reported data shows that **incomes for unreported households are lower than for “White, Not Hispanic” households.** (i.e., value reported for “All Races” is lower than for “White, Not Hispanic”).



Some values are not reported due to insufficient sample size or high margins of error.

# County Characteristics

## by Race or Ethnicity

Total Population			Population White, Not Hispanic			Population Other than "White, Not Hispanic"		
2017	2022	% Change	2017	2022	% Change	2017	2022	% Change
78,013	81,703	5%	67,424	69,106	1%	10,590	12,597	19%

# Study Area Workers

Work and live in Cape Girardeau County	8,466	52.9%
Live in Scott County County and work in Cape Girardeau County	1,173	7.3%
Live in Cape Girardeau County and work in St. Louis County	875	4.9%

# Top Employers

Name	Sector	Number of Employees
Saint Francis Healthcare System	Healthcare	2,817
SoutheastHEALTH	Healthcare	2,430
Procter & Gamble	Manufacturing	1,200
Southeast Missouri State University	Higher Education	1,107
Isle Casino Cape Girardeau	Gaming	450

Top 5 Industries
Retail
Educational Services
Manufacturing
Health Care
Wholesale Trade

Source: Cape Girardeau Area Chamber of Commerce

# Survey Insights

# Research Scope

This report focuses on qualitative community survey research of parents and employers based or working in Cape Girardeau, Dent, Crawford, and Pulaski Counties.

## Parents of children ages 5 and under (N=19 surveyed):

- Need for, current use of, and interest in early childhood education and care services;
- Awareness of assistance programs
- Preferences for child care type and location
- current challenges with accessing care
- Hopes for their children around ECE opportunities.

## Employers (N=10 surveyed):

- Employee child care related issues and needs that impact them and their workforce
- Their potential interest in supporting ECE services

## ECE Directors and Owners (Secondary Surveys)

- Missouri DESE Market Rate Survey: February-March 2024 (n=7)
- KidsWin/IFF Surveys September-November 2023, covering providers from Adair, Buchanan, Cole, Greene, Howell, and Jasper Counties.



# Key Takeaways

1

Access is rationed through cost and wait.

Getting a seat is difficult. **The biggest barriers are long waitlists and high prices.**

Waitlists loom particularly large in Cape Girardeau County.

2

Access: Inseparable from Quality

We often think of waiting lists and affordability as caused by limited supply: parents make it clear that we should understand these challenges as the by product of limited supply **of quality seats.**

3

Enrolling has many costs.

**Landing a seat - success - comes with many costs:** the supply gap is not just about those who are left out. It is also about the burdens of those who 'get in.'

4

Employers: hurt but unhelpful

Experience the childcare system through increased requests for time off or workers leaving their jobs entirely. Employers largely do not offer child care benefits, and they don't anticipate starting to.

Who are  
the  
Parents?

# Demographics of Respondents

Income Level	% of respondents
\$20,000 or less	0%
\$20,001 to \$40,000	13%
\$40,001 to \$60,000	13%
\$60,001 to \$80,000	13%
\$80,001 to \$100,000	6%
\$100,001 to \$150,000	38%
\$150,000 to \$200,000	6%
\$200,001 to \$250,000	12%
\$250,001 or more	0%



*Survey median is substantially above the County median of \$65k.*

# Demographics of Respondents

Race/Ethnicity	% of respondents
American Indian and Alaska Native	0%
Asian	0%
Black or African American	5%
Hispanic or Latino	0%
Multiracial or Biracial	0%
Native Hawaiian and Other Pacific Islander	0%
White	95%

*Meaningfully higher than county % white, ~86%.*



# The Parent's Experience

# Top challenges: waiting lists and affordability.

Statement for reaction:	% who disagree or disagree strongly
It is easy to find a provider <b>who does not have a waiting list</b> for enrollment	94%
It is easy to find a provider <b>who is affordable</b>	75%
It is easy to find a provider whose <b>availability fits my schedule</b>	56%
It is easy to find the <b>right provider for my child(ren)'s needs</b>	44%
It is easy to find a provider who is <b>conveniently located</b> for my family	38%

*IFF/KidsWin Parent Survey: Please select the response (Strongly disagree to Strongly agree) that best matches your experience with finding a child care or early learning provider for your child(ren) ages 5 and under.*

# Parents are always making trade-offs with quality.

We often think of waiting lists and affordability as caused by limited supply: parents make it clear that we should understand these challenges as the by product of limited supply **of quality seats.**

[Our biggest challenge] is budgeting to afford childcare and having to pay for 5 days a week when my child only attends 4 days. We prefer to use a facility instead of an in-home due to safety concerns of an in home and a better learning environment.

- Cape Girardeau County Parent

All of the daycares are too expensive and are not professional enough to warrant their prices

- Cape Girardeau County Parent

[Our biggest trade off] was settling on a facility and provider I did not want just so I had care for my child.

- Cape Girardeau County Parent

# Signing up... then waiting.

**% of parents on waitlists  
prior to enrolling**

**94%**

*IFF/KidsWin Parent Survey: Prior to enrolling your child(ren) in child care or early learning, were they placed on a wait list?*



# Signing up... then waiting.

**% of parents on waitlists  
prior to enrolling**

**94%**

“

We were on a wait list for our 3 preferred day care options for 6 months for our daughter when she was 18 months old. We were able to find a day care that would take her after a month of searching.

- **Cape Girardeau County  
Parent**

“

We have paid full price for childcare before they could even attend to hold their place. Looking back it's a little crazy to say that we paid between both kids roughly \$2500 for childcare when our kids were home with us just to hold our place.

- **Cape Girardeau County  
Parent**

*IFF/KidsWin Parent Survey: Please share more about how long each of your children were on a wait list, and their age(s) while on the wait list(s).*

# The median amount parents in our survey are paying.



\$840

**Infant/Baby**  
(0-2)



\$680

**Toddler**  
(2-3)



\$680

**Pre-Schooler**  
(3-5)

*IFF/KidsWin Parent Survey: Approximately how much money do you spend monthly on child care or early learning for each of your child(ren)? Please enter your total monthly cost in dollars.*

# What it can feel like to be a pay the bill.



Not having much extra income for monthly expenses.

-- **Cape Girardeau County Parent**

We are living paycheck to paycheck as a result of the high cost of child care for two children.

-- **Cape Girardeau County Parent**

We spend twice the amount of our mortgage for childcare for 2 children under age 5.

-- **Cape Girardeau County Parent**



# What it can feel like to be a pay the bill.



Not having much extra income for monthly expenses.

-- **Cape Girardeau County Parent (\$60,001 - \$80,000)**

We are living paycheck to paycheck as a result of the high cost of child care for two children.

-- **Cape Girardeau County Parent (\$60,001 - \$80,000)**

We spend twice the amount of our mortgage for childcare for 2 children under age 5.

-- **Cape Girardeau County Parent (\$100,001 - \$150,000)**



# Navigating the current system has many hidden costs.

Which of the following have you or another adult member of your household done in order to accommodate child care availability?	
Reduced working hours	<b>42%</b>
Switched jobs	<b>26%</b>
Changed work schedule without changing employers	<b>21%</b>
Left the workforce to stay home with children	<b>11%</b>
Started to work-from-home	<b>5%</b>
Moved to a new home	<b>5%</b>
Left the workforce to pursue education and gain child care flexibility	<b>0%</b>

*None of the Above? 11%*

*Other?*

*“Having to clock out in order to pick my child up in time due to daycare closing before my shift was over. Basically not receiving a proper lunch or miss some time from work.”*


*IFF/KidsWin Parent Survey: Thinking about the changes you may have made in order to accommodate child care availability, which of the following have you or another adult member of your household done for this reason? Please choose as many as apply.*

# The Employer's Experience

# Childcare is a recognized challenge, and most organizations feel some impact.

How much does your employees' access to child care affect your business?	
<b>Greatly</b> - employees' access to child care causes major challenges for my business	20%
<b>Significantly</b> - employees' access to child care causes moderate challenges for my business	30%
<b>Slightly</b> - employees' access to child care causes minor challenges for my business	40%
<b>Not at all</b> - employees' access to child care does not cause challenges for my business	10%

*50% experience moderate or major challenges*



*IFF/KidsWin Employer Survey: To the best of your knowledge, how much does your employees' access to child care affect your business? Impacts to consider include: challenges in hiring or retaining employees, scheduling difficulties, operating below full capacity, disruptions to your operations, etc.*

# What are the specific impacts of childcare and how many businesses feel them?

Which of the following events, if any, has your company experienced during the past year, due to employees' access to child care?	
Employees terminating their employment	<b>60%</b>
Employees taking time off to fill child care gaps	<b>40%</b>
Employees trading shifts with co-workers, or otherwise temporarily changing their work hours / availability	<b>40%</b>
Candidates declining employment offers	<b>40%</b>
Employees permanently changing their work hours / availability	<b>20%</b>
None of the above	<b>30%</b>

*IFF/KidsWin Employer Survey: Which of the following events, if any, has your company experienced during the past year, due to employees' access to child care?*



# Employers: their experiences

Employees that do not have family around here would have trouble finding daycare for nights and weekends when they're scheduled to work. This would force them to look for a daytime job.

- Cape Girardeau Scheduling Manager

I don't have employees coming to say they can't find childcare. Or leaving because of it. Some leave because of childcare issues with rotating shifts.

- Cape Girardeau Respondent

[Employees experience] sick children, unexpected snow days, lack of places to take children for nights/ 12 hour shifts, lack of care for challenged children.

- Cape Girardeau Respondent

# The Provider's Experience

# Waitlists are prevalent, yet providers often operate under licensed capacity.

**80%** of surveyed providers report having a waiting list of children, echoing parents' experiences, yet **48%** of licensed providers report operating below licensed capacity.

Which of the following best describes how your actual enrollment compares with the licensed capacity of your child care or early learning location(s)?

Enrollment is very close or exactly matched (within 5%) to licensed capacity	44%
Enrollment is slightly (up to 10%) lower than licensed capacity	6%
Enrollment is somewhat (10-20%) lower than licensed capacity	19%
Enrollment is much (20% or more) lower than licensed capacity	22%
Don't Know / Not Sure	8%

*IFF/KidsWin Provider Survey: Which of the following best describes how your actual enrollment compares with the licensed capacity of your child care or early learning location(s)?*

*IFF/KidsWin Provider Survey: Do you currently have a waiting list of children whom you cannot currently accommodate in your child care or early learning location(s)?*

# 96% of providers report one or more major challenges to hiring.

Which of the following have you experienced with hiring and retaining staff during the last year in your child care or early learning location(s)? Please choose as many as apply.

Cannot afford to offer a wage that will attract applicants	<b>66%</b>
Staff leaving to take positions elsewhere	<b>45%</b>
Not enough applicants for open positions	<b>51%</b>
Applicants do not have the needed work experience	<b>45%</b>
Applicants lack needed training	<b>34%</b>
None of the above	<b>4%</b>

*IFF/KidsWin Provider Survey: Which of the following have you experienced with hiring and retaining staff during the last year in your child care or early learning location(s)? Please choose as many as apply.*

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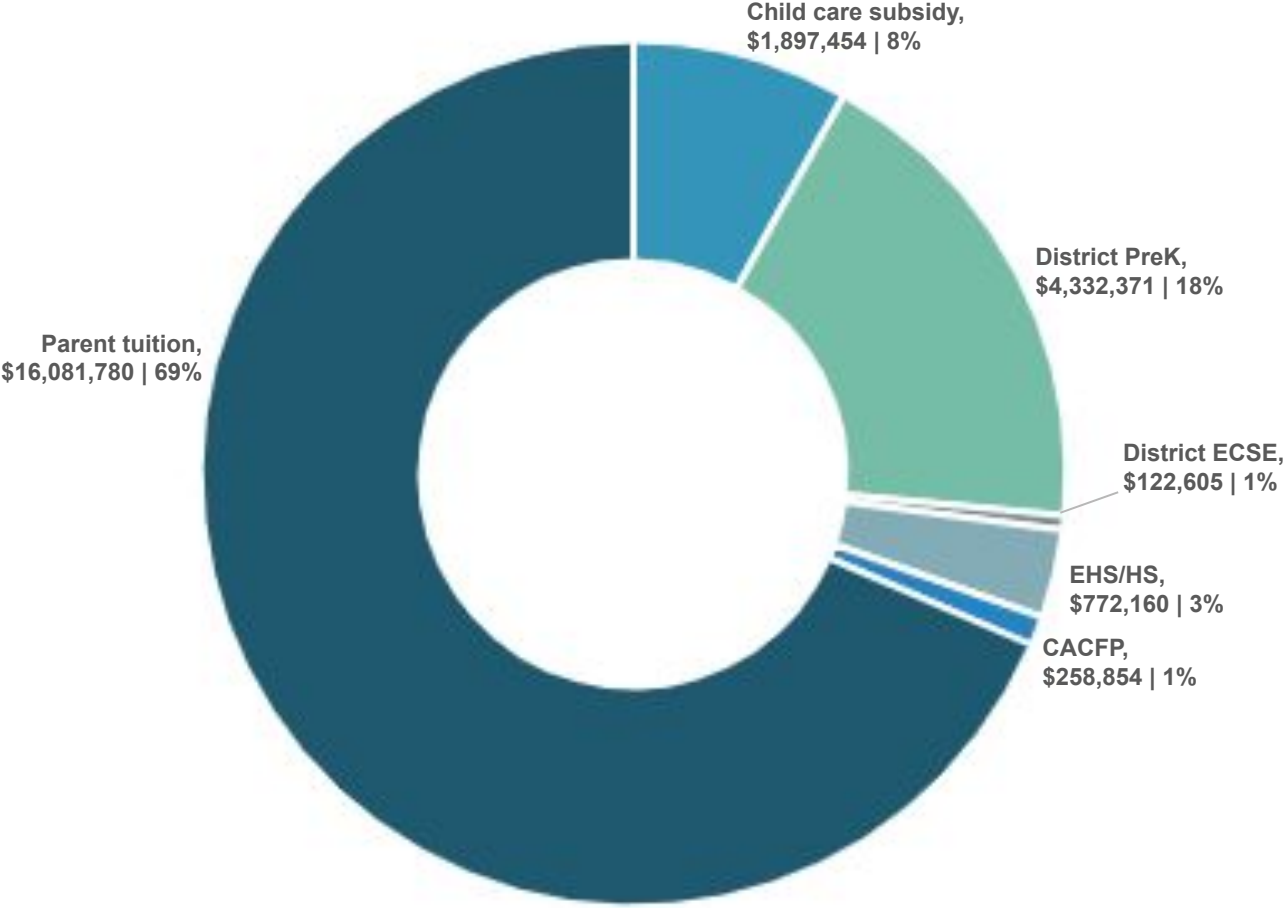
Fiscal  
Mapping  
&  
Cost  
Modeling

# Fiscal Mapping

## Data Sources

- Office of Childhood: Child Care Subsidy Monthly Management Reports
- Missouri Department of Health and Senior Services
- Missouri Market Rate Survey
- Candid: Philanthropy Database
- Missouri Department of Elementary and Secondary Education
- School districts
  - Cape Giardeau Public Schools
  - Delta R-V Schools
  - Jackson R-2 School District

# ECE Funding 2023





# Fiscal Mapping

- Total funding: **\$23,465,224**
- Parents are carrying a heavy burden
  - Average cost of parent tuition (Market Rate Survey data, n=6):
    - \$10,634/year for infants & toddlers
    - \$10,140/year for preschool
- Opportunity to increase the utilization of subsidized slots
- General philanthropy vs ECE-specific (\$2,365,185 vs \$0) - 2023

# Cost Modeling

- Baseline scenarios represent the current system - is it working?
- Built using both Missouri Market Rate Survey (MRS) and default data for Missouri when local values were not available
- Local salary ranges: no benefits, professional development included (MRS data).  
Director (\$42,640), Lead Teacher (\$30,560), Assistant Teacher (\$27,000)
- Tuition rates were based on Market Rate Survey data -
  - \$204.50/week - IT
  - \$195/week - PS

# Cost Modeling

Higher Level Models can be built with the following benchmark adjustments:

- Higher salaries
- Health insurance
- PTO
- Additional administrative/classroom support staffing

**Q:**

Are these the right benchmarks? What should a more ideal scenario include?  
What is the size of the program? What is the ideal age mix?

# Cost Modeling

## Nonprofit Program Baseline Model

56 children total  
16 IT  
40 Preschool

\*Does not include health insurance, PTO, or other benefits or additional administrative support

\*Assumes 85% enrollment efficiency & 2% uncollected revenue

\*Assumes 13% of children receive child care subsidy

\*Assumes \$200,000 in grant revenue

### Net Revenue

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Net Revenue	\$68,963
Net Revenue as a Percent of Total	10%

### Cost Per Child

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Cost Per Child 0-2 yrs	\$15,914
Cost Per Child 3-5 yrs	\$10,136
Staffed Capacity	56
<b>TOTAL TEACHING STAFF</b>	<b>9.6</b>

# Cost Modeling

## Nonprofit Program “PLUS” Model

56 children total  
16 IT  
40 Preschool

\*\$6000 health, 3 weeks PTO,  
\$1000/teacher PD

\*Assumes 85% enrollment efficiency &  
2% uncollected revenue

\*Assumes 13% of children receive child  
care subsidy

\*Assumes \$350,000 in grant/fundraising

### Net Revenue

Net Revenue	\$33,555
Net Revenue as a Percent of Total	4%

### Cost Per Child

Cost Per Child 0-2 yrs	\$21,205
Cost Per Child 3-5 yrs	\$12,655
Staffed Capacity	56
<b>TOTAL TEACHING STAFF</b>	<b>9.6</b>

# Cost Modeling

## Home-based Program Baseline Model

10 children total

4 IT

6 Preschool

\*Does not include health insurance, PTO, or other benefits or additional administrative support

\*Assumes 1 assistant in a 1500 sq ft home (80% space used for care)

\*Assumes 85% enrollment efficiency & 1% uncollected revenue

\*Assumes 38% of children receive child care subsidy

### Net Revenue

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Net Revenue	\$15,037
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Net Revenue as a Percent of Total	23%
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### Cost Per Child

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Cost per child average	\$5,168
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# Cost Modeling

## Home-based Program Baseline “PLUS” Model

10 children total  
4 IT  
6 Preschool

\*\$55,000 salary for director/owner

\*\$15/hr plus \$6000 health for assistant,  
\$1000/teacher PD

\*Assumes 1500 sq ft home (80% space used  
for care)

\*Assumes 85% enrollment efficiency &  
2% uncollected revenue

\*Assumes 13% of children receive child care  
subsidy

## Net Revenue

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Net Revenue	-\$4,787
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Net Revenue as a Percent of Total	-7%
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## Cost Per Child

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Cost per child average	\$7,647
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# Meeting #3

## Strategy Work Session

September 18, 2024



# Agenda

Review key findings

Priorities

Root Causes

Strategy Brainstorm

Next Steps

# Key Findings

- The study area needs more than 1,000 additional slots, and nearly all of those additional slots are needed for Infants/Toddlers.
- There are no Early Head Start slots.
- More than 300 additional Head Start slots are needed.
- Pre-K capacity is meeting the needs of the community.
- Only about 10% of the children who are eligible for the state subsidy program are successfully accessing it.
- From 2017 to 2022, the number of kids ages 0-5 has decreased by 3%. However, the number of kids in households with all parents working is up 14%.
- Over the same time period, the county population as a whole is up slightly while there has been a 19% increase in the number of people who identify as a race or ethnicity other than “White, Not Hispanic”.

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Pre-K (4-5 years) slots and kids are a subset of Preschool (3-5 years) slots and kids

# Priorities

**Increase access to high-quality, affordable, and accessible infant-toddler care.**

**Support, strengthen, and build the child care workforce.**

**Engage business, civic, and philanthropic communities to achieve all current and future priorities.**

# Root Causes

## Infant/toddler care

THEME: **Accessibility:** It was reported that finding high-quality, affordable infant/toddler care was related to waitlists, availability of slots that work for a family, and/or quality of those available slots.

THEME: **Operations:** The cost of operating a private infant/toddler center is high due to staffing requirements, unit/facility requirements (i.e., bathrooms, changing stations, equipment), and limited resources to purchase and provide the items needed. Operating infant/toddler programs can be quite costly; and that cost is often passed on by increasing tuition.

# Root Causes

## **Workforce attraction and retention -**

**THEME: Undercompensation:** A low thriving wage, with limited to no benefits, has made it difficult to recruit potential educators and can make it difficult for staff to stay long-term in early childhood education.

**THEME: Undervalued and under-supported:** Staff and educators are not always given the esteem that other educators or professions receive despite certification and/or education requirements.

The work is physically and mentally draining. Centers are short staffed or can lack consistent staff which has an impact on the team and children. Professional development is costly and not all providers are able to provide for their workers. Also reported increases in challenging behaviors in the classroom and a lack of training and support to accommodate these needs.

# Root Causes

## **Business, civic, philanthropic communities**

**THEME: Lack of connectedness:** It was reported that the business, philanthropic and provider community do not feel connected. Providers may not realize that employers and philanthropy are resources and connectors. Child care can impact the business's bottom line however managers may not yet currently view it as a significant issue.



# Strategy Brainstorming

What do you think could be done to move the needle?

New ideas? Things have worked in the past? THings you are curious about?

What's being tried in other parts of the state and country?

What's  
next?

Thank  
You!