



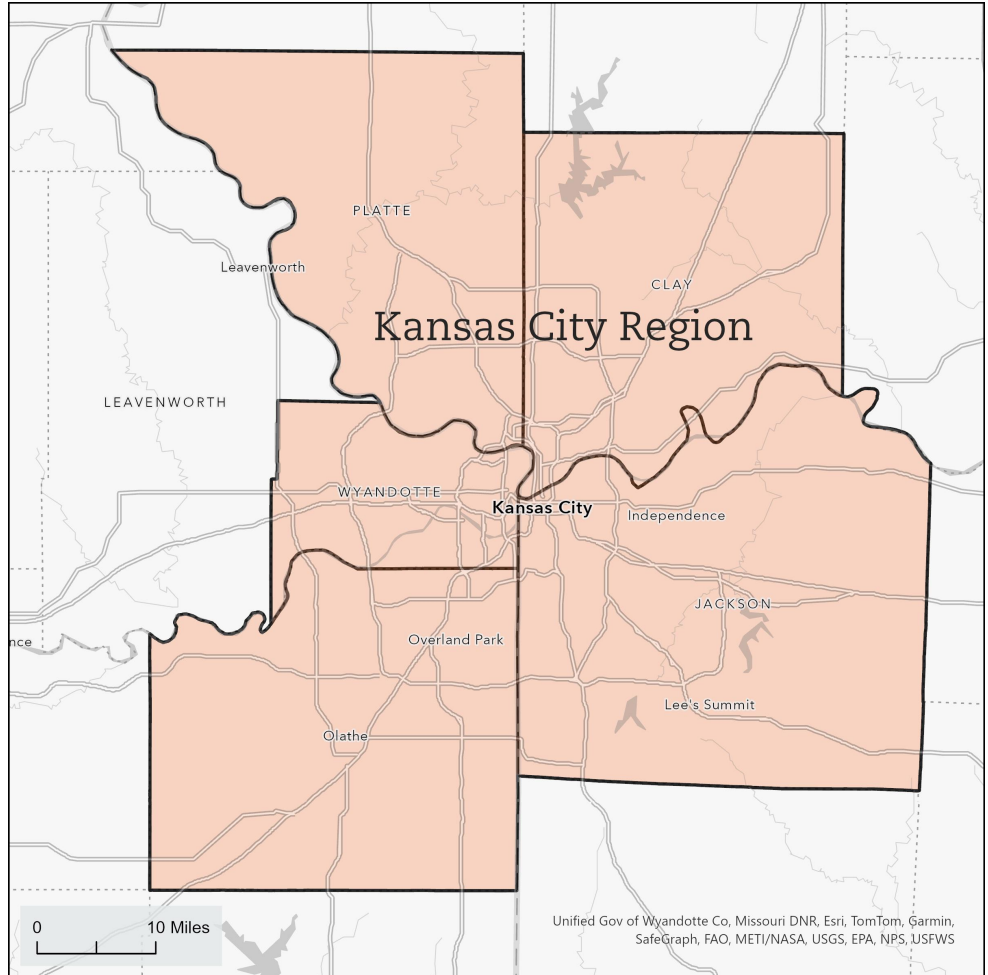
Connecting the P.I.E.C.E.S. KC

Community Team Data

Study Area

Kansas City region

- Kansas
 - Johnson County
 - Wyandotte County
- Missouri
 - Clay County
 - Jackson County
 - Platte County



Data Overview

Data Sources

- Data carried over from IFF's [2023 ECE study of the Kansas City metro area](#):
 - Provider information (ages 0-2, Pre-K, other 3-5)
 - Family need
 - American Community Survey 5-year estimates (2015-2019)
 - Esri demographic estimates
- New/Updated information
 - Head Start/Early Head Start slots
 - Local data compiled by Kids Win staff
 - Household characteristics and trends
 - American Community Survey 5-year estimates, 2018-2022 and 2013-2017

Key Findings

- The region needs more than 30,000 additional Infant-Toddler slots.
- There is a slight surplus of slots for 3-5 year olds in the region, with extra slots in Johnson County and Jackson County, and shortages in the other counties.
- Additional Early Head Start, Head Start, and Pre-K slots are needed in all counties.
- More than 30,000 children who are eligible for the state subsidy program are not accessing it.
- The population of children ages 0-5 is down slightly in the period 2017-2022.
- Median Household Income (MHI) in the region is up about 10% over the same period.
- MHI in the region varies significantly by race and ethnicity. For example, MHI for Black households is significantly lower than the MHI for all households.

Provider Capacity

		NUMBER OF PROVIDERS*	NUMBER OF SLOTS*	HEAD START / EARLY HEAD START SLOTS (UPDATED)**	PRE-K SLOTS
KANSAS	JOHNSON	690	30,707	223	5,354
	WYANDOTTE	120	5,181	297	1,368
MISSOURI	CLAY	102	7,496	230	954
	JACKSON	408	28,127	2,012	3,117
	PLATTE	33	2,305	58	417
KC METRO TOTAL		1,353	73,816	2,820	11,210

*Does not include Pre-K or HS/EHS programs.. **Early Head Start includes home-based programs.

Provider Capacity by Age Group

		INFANT & TODDLER SLOTS (BIRTH-2 YEARS)	PRESCHOOL+ PRE-K SLOTS (3-5 YEARS)	EARLY HEAD START SLOTS (UPDATED)	HEAD START SLOTS (UPDATED)
KANSAS	JOHNSON	10,411	25,650	115	108
	WYANDOTTE	1,331	5,218	132	165
MISSOURI	CLAY	1,660	6,790	18	212
	JACKSON	4,278	26,516	501	1,511
	PLATTE	484	2,238	18	40
KC METRO TOTAL		18,614	66,412	784	2,036

Preschool (age 3-5 years) includes Pre-K programs. Early Head Start includes home-based programs.

State Subsidy Utilization

		INFANT & TODDLER (BIRTH-2 YEARS)	PRESCHOOL (3-5 YEARS)	TOTAL, ALL AGE GROUPS
KANSAS	JOHNSON	187	189	376
	WYANDOTTE	84	85	169
MISSOURI	CLAY	82	240	322
	JACKSON	555	997	1,552
	PLATTE	16	39	55
KC METRO TOTAL		924	1,550	2,474

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 eligible for state subsidized care (*185% of Federal Poverty Level, as calculated for the 2023 study*)
- Estimated number of children eligible for Early Head Start and Head Start programming
- Demand for care is based on 70% of total kids (*Demand from the 2023 study was based on 100% and has been updated by calculating 70% of those numbers from the 2023 study.*)

Family Need by Age Group

		INFANT & TODDLER (BIRTH-2 YEARS)	PRESCHOOL (3-5 YEARS)	TOTAL, ALL AGE GROUPS
KANSAS	JOHNSON	16,339	16,964	33,303
	WYANDOTTE	5,452	5,399	10,851
MISSOURI	CLAY	6,869	7,170	14,039
	JACKSON	19,254	19,181	38,434
	PLATTE	2,546	2,647	5,193
KC METRO TOTAL		50,460	51,360	101,820

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

Eligibility Analysis: Birth-2 Years

		KIDS WHO NEED CARE	ELIGIBLE FOR STATE SUBSIDY	ELIGIBLE FOR EARLY HEAD START
KANSAS	JOHNSON	16,339	2,932	2,276
	WYANDOTTE	5,452	3,296	2,771
MISSOURI	CLAY	6,869	1,580	1,467
	JACKSON	19,254	8,478	6,904
	PLATTE	2,546	670	536
KC METRO TOTAL		50,460	16,956	13,955

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

Eligibility Analysis: 3-5 Years

		KIDS WHO NEED CARE	ELIGIBLE FOR STATE SUBSIDY	ELIGIBLE FOR HEAD START	ELIGIBLE FOR PRE-K
KANSAS	JOHNSON	16,964	2,866	2,219	5,702
	WYANDOTTE	5,399	3,233	2,719	1,795
MISSOURI	CLAY	7,170	1,511	1,481	2,395
	JACKSON	19,181	8,112	6,806	6,343
	PLATTE	2,647	641	537	883
KC METRO TOTAL		51,360	16,363	13,761	17,118

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

Gap Analysis

- Where are the shortfalls and surpluses when we compare capacity and need?
 - By age group
 - By program

Gap in Total Slots: Birth-2 Years

		INFANT & TODDLER SLOTS	KIDS WHO NEED CARE	GAP IN SLOTS, TOTAL	PERCENT SERVED
KANSAS	JOHNSON	10,411	16,339	-5,928	64%
	WYANDOTTE	1,331	5,452	-4,121	24%
MISSOURI	CLAY	1,660	6,869	-5,209	24%
	JACKSON	4,278	19,254	-14,526	25%
	PLATTE	484	2,546	-2,062	19%
KC METRO TOTAL		18,614	50,460	-31,846	37%

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

Gap in Total Slots: 3-5 Years, not Pre-K

		PRESCHOOL (NOT PRE-K) SLOTS	KIDS AGE 3-5 WHO NEED CARE	GAP IN SLOTS, TOTAL	PERCENT SERVED
KANSAS	JOHNSON	20,296	16,964	3,332	120%
	WYANDOTTE	3,850	5,399	-1,549	71%
MISSOURI	CLAY	5,836	7,170	-1,334	81%
	JACKSON	23,399	19,181	4,218	122%
	PLATTE	1,821	2,647	-826	69%
KC METRO TOTAL		55,202	51,360	3,842	107%

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

Gap in Pre-K Slots

		PRE-K SLOTS	KIDS ELIGIBLE FOR PRE-K	GAP IN PRE-K SLOTS	PERCENT SERVED
KANSAS	JOHNSON	5,354	5,702	-348	94%
	WYANDOTTE	1,368	1,795	-427	76%
MISSOURI	CLAY	954	2,395	-1,441	40%
	JACKSON	3,117	6,343	-3,226	49%
	PLATTE	417	883	-466	47%
KC METRO TOTAL		11,210	17,118	-5,908	65%

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

Gap in Early Head Start Slots

		EARLY HEAD START SLOTS (UPDATED)	ELIGIBLE FOR EARLY HEAD START	GAP IN EHS SLOTS	PERCENT SERVED
KANSAS	JOHNSON	115	2,276	-2,161	5%
	WYANDOTTE	132	2,771	-2,639	5%
MISSOURI	CLAY	18	1,467	-1,449	1%
	JACKSON	501	6,904	-6,403	7%
	PLATTE	18	536	-518	3%
KC METRO TOTAL		784	13,955	-13,171	6%

Early Head Start includes home-based programs. This table is based on the assumption that 70% of kids need care.

Gap in Head Start Slots

		HEAD START SLOTS (UPDATED)	ELIGIBLE FOR HEAD START	GAP IN HS SLOTS	PERCENT SERVED
KANSAS	JOHNSON	108	2,219	-2,111	5%
	WYANDOTTE	165	2,719	-2,554	6%
MISSOURI	CLAY	212	1,481	-1,269	14%
	JACKSON	1,511	6,806	-5,295	22%
	PLATTE	40	537	-497	7%
KC METRO TOTAL		2,036	13,761	-11,725	15%

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

Gap in State Subsidy Utilization

		GAP, BIRTH-2 YEARS	PERCENT SERVED, BIRTH-2 YEARS	GAP, 3-5 YEARS	PERCENT SERVED, 3-5 YEARS
KANSAS	JOHNSON	-2,745	6%	-2,677	7%
	WYANDOTTE	-3,212	3%	-3,148	3%
MISSOURI	CLAY	-1,498	5%	-1,271	10%
	JACKSON	-7,923	7%	-7,115	9%
	PLATTE	-654	2%	-602	4%
KC METRO TOTAL		-16,032	5%	-14,813	7%

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

Family Characteristics

Data and Trends

- Total children aged 0-5
- Households with all parents working
- Household income
- How have these characteristics changed over time?
- Does a racial equity lens on household income reveal differences in ECE affordability?

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

Household Characteristics

		POPULATION, 0-5 YEARS			CHILDREN 0-5 WITH ALL PARENTS WORKING		
		2017	2022	% CHANGE	2017	2022	% CHANGE
KANSAS	JOHNSON	45,618	43,670	-4%	32,068	32,025	0%
	WYANDOTTE	15,554	14,031	-10%	10,160	9,306	-8%
MISSOURI	CLAY	18,397	17,736	-4%	13,022	12,567	-3%
	JACKSON	52,695	52,748	0%	35,540	37,687	6%
	PLATTE	7,285	7,087	-3%	5,131	4,929	-4%
KC METRO TOTAL		78,375	77,569	-1%	53,692	55,182	3%

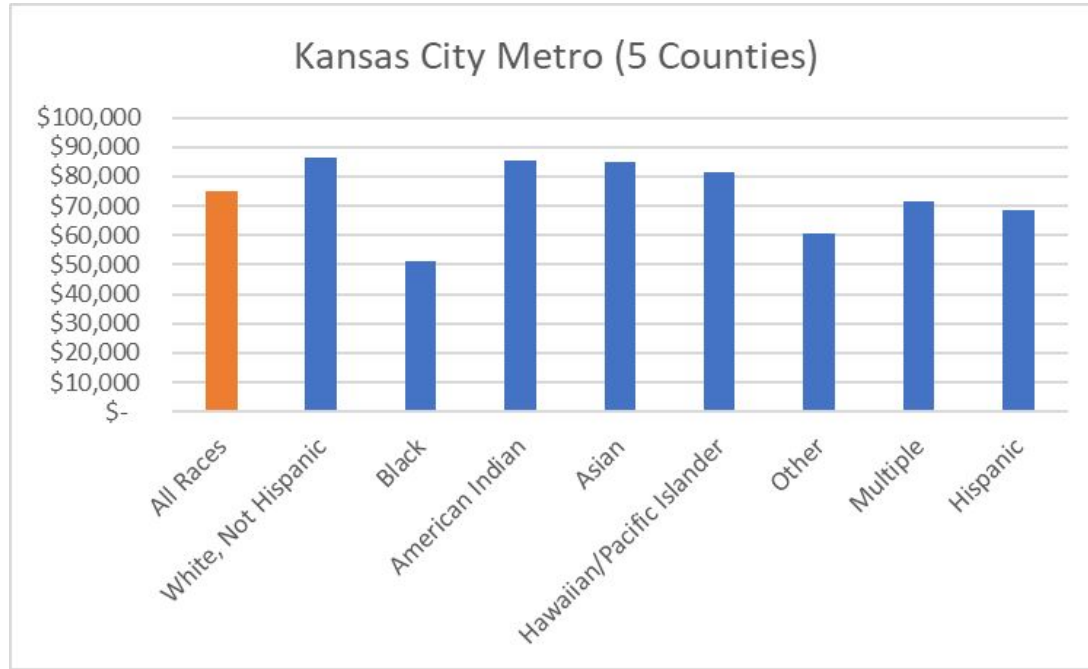
Household Characteristics

		MEDIAN HOUSEHOLD INCOME		
		2017 (IN 2022 DOLLARS)	2022	% CHANGE
KANSAS	JOHNSON	\$ 97,152	\$ 103,644	7%
	WYANDOTTE	\$ 51,237	\$ 57,771	13%
MISSOURI	CLAY	\$ 78,653	\$ 82,264	5%
	JACKSON	\$ 60,661	\$ 65,169	7%
	PLATTE	\$ 88,862	\$ 92,543	4%
KC METRO*		\$ 75,310	\$ 82,721	10%

* Metro totals shown here are a simple average (mean) of MHI for the five counties.

Median Household Income, 2022

by Race or Ethnicity



Metro totals shown here are a simple average (mean) of MHI for the five counties. Some values are not reported due to insufficient sample size or high margins of error.

Median Household Income, 2022

by Race or Ethnicity

		ALL RACES	WHITE, NOT HISPANIC	BLACK	AMERICAN INDIAN	ASIAN	HAWAIIAN/ PACIFIC ISLANDER	OTHER	MULTIPLE	HISPANIC
KANSAS	JOHNSON	\$103,644	\$107,165	\$67,303	-	\$119,367	-	-	\$94,327	\$77,136
	WYANDOTTE	\$57,771	\$68,099	\$43,836	\$85,625	\$53,685	-	\$51,840	\$57,500	\$55,607
MISSOURI	CLAY	\$82,264	\$85,922	-	-	\$104,449	\$56,188	\$72,942	\$78,205	\$72,542
	JACKSON	\$65,169	\$76,181	\$41,896	-	\$62,887	-	\$56,939	\$55,791	\$55,642
	PLATTE	\$92,543	\$94,413	-	-	-	\$106,404	-	-	-
KC METRO*		\$74,746	\$86,356	\$51,012	\$85,625	\$85,097	\$81,296	\$60,574	\$71,456	\$68,691

Some values are not reported due to insufficient sample size or high margins of error (greater than 15%).

* Metro totals shown here are a simple average (mean) of MHI for the five counties.

Survey Insights

Research Scope

This report focuses on qualitative community survey research of parents and employers based or working in Johnson and Wyandotte Counties in Kansas, and Clay, Jackson, and Platte Counties in Missouri.

Parents of children ages 5 and under (N=213 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=24 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=122), the 3 Missouri counties from the Study Area
- Kids Win Supplied Q1 Quarterly Check-In: February 2024 (n=239), primarily Johnson County

Key Takeaways

1

Access is elusive and inequitable.

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

These barriers are often most difficult to navigate for those experiencing other challenges.

2

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.'

3

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.

4

Supply: even fewer quality seats?

Providers routinely cite staffing as a challenge that reduces quality and leads to operating below capacity. **Supply is more nuanced than headline stats.**

Who are
the
Parents?

Demographics of Respondents

County of Respondent	%
Jackson	52%
Johnson (KS)	25%
Clay	11%
Wyandotte (KS)	7%
Platte	2%
Other	3%

Demographics of Respondents

County of Respondent	%
Jackson	52%
Johnson (KS)	25%
Clay	11%
Wyandotte (KS)	7%
Platte	2%
Other	3%

Real % Shares

37%

32% - Underrepresented

14% - Underrepresented

9% - Underrepresented

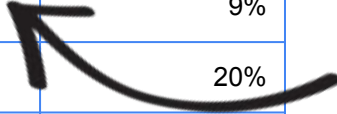
6% - Underrepresented

Demographics of Respondents

Income Level	% of respondents
\$20,000 or less	12%
\$20,001 to \$40,000	11%
\$40,001 to \$60,000	9%
\$60,001 to \$80,000	10%
\$80,001 to \$100,000	9%
\$100,001 to \$150,000	20%
\$150,000 to \$200,000	16%
\$200,001 to \$250,000	4%
\$250,001 or more	7%

Demographics of Respondents

Income Level	% of respondents
\$20,000 or less	12%
\$20,001 to \$40,000	11%
\$40,001 to \$60,000	9%
\$60,001 to \$80,000	10%
\$80,001 to \$100,000	9%
\$100,001 to \$150,000	20%
\$150,000 to \$200,000	16%
\$200,001 to \$250,000	4%
\$250,001 or more	7%



Survey median is within the range of 5 county average of medians: \$82.7k.

However, Jackson County = \$65.1k, where our survey respondents are overrepresented.

Demographics of Respondents

Race/Ethnicity	% of respondents
American Indian and Alaska Native	2%
Asian	3%
Black or African American	19%
Hispanic or Latino	12%
Multiracial or Biracial	8%
Native Hawaiian and Other Pacific Islander	1%
White	55%

Demographics of Respondents

Race/Ethnicity	% of respondents
American Indian and Alaska Native	2%
Asian	3%
Black or African American	19%
Hispanic or Latino	12%
Multiracial or Biracial	8%
Native Hawaiian and Other Pacific Islander	1%
White	55%



An exact match is pretty hard. Overall % White across 5 counties is ~73%, but we know parents of young children are less white, so we might be close.

The Parent's Experience

One filled seat.



Our kid goes to a great center and we are fortunate that they had a spot and we can afford it.



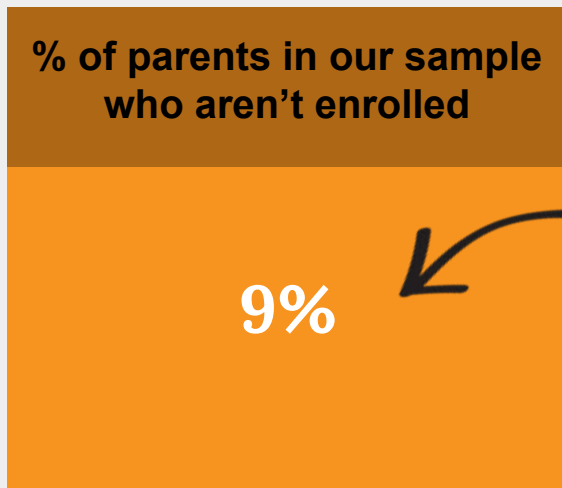
-- Johnson County Parent

Top challenges: what the data tells us.

Statement for reaction:	% who disagree or disagree strongly
It is easy to find a provider who does not have a waiting list for enrollment	59%
It is easy to find a provider who is affordable	58%
It is easy to find the right provider for my child(ren)'s needs	32%
It is easy to find a provider who is conveniently located for my family	30%
It is easy to find a provider whose availability fits my schedule	27%

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.

Who is being left out?



The floor?

**Jackson at 5% to
Johnson at 15%**

IFF/KidsWin Parent Survey: Thinking about your child(ren) ages 5 and under, are any of them currently enrolled in child care or early learning (i.e. day care, pre-school, Head Start, etc.)?

Who is being left out?

**% of parents in our sample
who aren't enrolled**

9%

“
It was extremely hard finding childcare because he has autism and was non-verbal.

Most places didn't have the staff to assist with kids with [disabilities]. I [kept] him home as a child because the challenges [were] too hard.

- **Jackson County Parent**

“
My family needs non traditional hours in before 6am and sometimes as late as 6pm. We do not have the support system and cannot afford the additional cost of paying someone to drop off at open times plus the cost of tuition.

- **Platte County Parent**

IFF/KidsWin Parent Survey: Please share more about the specific challenges you have encountered when seeking child care or early learning for your child(ren).

Signing up... then waiting.

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

57%

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**

57%

“

We only found a spot at a more expensive newly opened daycare.

She didn't get accepted off waitlist to [the] one we wanted for 2.5 years.

- Jackson County Parent

“

My first born was on 4 different wait lists. One daycare told me it would be 2 years before he had a spot. Two daycares said 6-9 months.

We put his name on the waitlist when I was 3 months pregnant.

- Jackson 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.

A large orange square with a white border, containing the text '\$1.2k' in white.

\$1.2k

Infant/Baby
(0-2)

A large blue square with a white border, containing the text '\$1.0k' in white.

\$1.0k

Toddler
(2-3)

A large yellow square with a white border, containing the text '\$500' in white.

\$500

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.

The median amount parents in our survey are paying.

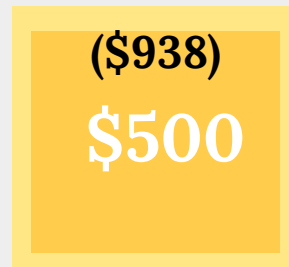
Johnson County



Infant/Baby
(0-2)



Toddler
(2-3)



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.

“

We have almost half of our income tied up in childcare, which means our family cannot relocate to a more safe part of the Kansas City Metro, as we cannot afford a higher cost mortgage in addition to our childcare monthly costs. We are worried that when our oldest starts school, they will not be living and learning in a safe and thriving school district, because we cannot afford to move, even though we so desperately want to.

-- Jackson County Parent

”

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?

Changed work schedule without changing employers	32%
Reduced working hours	19%
Left the workforce to stay home with children	16%
Switched jobs	14%
Started to work-from-home	13%
Moved to a new home	6%
Left the workforce to pursue education and gain child care flexibility	4%

None of the Above? 23%

Other?

“Side jobs like instacart and easy gigs to make extra money”

“Have to work on the weekends to make up the amount of work missed in order to drop off and pick up in time.”

“Made and followed a strict budget”

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.

One filled seat.



Our kid goes to a great center and we are fortunate that they had a spot and we can afford it.



-- Johnson County Parent

One filled seat. However...



Our kid goes to a great center and we are fortunate that they had a spot and we can afford it. **However** it cost more than our mortgage when he was an infant. We intentionally only had one child because daycare costs so much. We also drive an older (2006) vehicle that we want to replace. I have the burden of drop offs and most pick ups because my work schedule is more flexible, but after several years my husband asked his employer to be late one day per week so that I could have a morning "off."




-- Johnson County Parent

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?	
Greatly - employees' access to child care causes major challenges for my business	13%
Significantly - employees' access to child care causes moderate challenges for my business	30%
Slightly - employees' access to child care causes minor challenges for my business	43%
Not at all - employees' access to child care does not cause challenges for my business	13%

43% 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.

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

How much does your employees' access to child care affect your business?	
Greatly - employees' access to child care causes major challenges for my business	13%
Significantly - employees' access to child care causes moderate challenges for my business	30%
Slightly - employees' access to child care causes minor challenges for my business	43%
Not at all - employees' access to child care does not cause challenges for my business	13%


43% experience moderate or major challenges

Who are these 13%? Businesses that largely don't employ mothers!

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 taking time off to fill child care gaps	71%
Employees trading shifts with co-workers, or otherwise temporarily changing their work hours / availability	54%
Candidates declining employment offers	42%
Employees permanently changing their work hours / availability	42%
Employees terminating their employment	33%
None of the above	4%

Whether they think it's significant or not, impact is nearly universal.



Employers: their experiences

There is a huge lack of available and affordable before and after-school care and the district has greatly reduced their bussing services. This requires parents to arrive late and leave early, which isn't an option for all positions.

- **Johnson County Manager**

Based on our 12 hour swing shift rotation, child care for many employable individuals / couples is not possible unless they have a family member or relative [nearby] that can assist

- **Jackson County Vice President of Operations**

I know that daycare costs are prohibitive which is why a large number of our employees use the Y-Care system. We looked at sponsoring some type of daycare benefit, but found to truly be beneficial to the employee the cost was too high to enact properly.

- **Johnson County HR Manager**

The Provider's Experience

Providers consistently operate below capacity.

If you're not serving your total allowed capacity, what is the reasoning?	
Lack of families enrolling	24%
Not enough staff to maintain classroom ratios	13%
Other	41%

67% of the total sample are below capacity!

Other?

“I'm one provider, and content with what I have.”

“I don't want older children so I'm limited.”

“My townhome is just too small

Providers consistently operate below capacity, yet they still keep waitlists.

If you're not serving your total allowed capacity, what is the reasoning?	
Lack of families enrolling	24%
Not enough staff to maintain classroom ratios	13%
Other	41%

67% of the total sample are below capacity!

Keep in mind: 74% of providers from our study area in the Missouri DESE study report having a wait list.

Missouri DESE: Does your program maintain a waitlist of current families actively seeking care? If yes, provide the average number of children on the waitlist for each age group you serve.

Other?

“I'm one provider, and content with what I have.”

“I don't want older children so I'm limited.”

“My townhome is just too small

Staffing Challenges

If you have had difficulties in recruiting and retaining staff over the past year, what are the primary reasons for this?	
It is difficult to recruit staff who want to work in a child care setting	44%
My program has struggled to pay a competitive wage	36%
I am unable to provide additional benefits such as health insurance, 401(k)/retirement, etc.	29%
Other	9%

Other?

“Educational qualifications and experience/knowledge with trauma”

“Finding GOOD employees who WANT to work.”

“People don't realize what a emotionally and physical job this is. [It's] not babysitting. [It's] a hands on demanding job.”

Missouri DESE: If you have had difficulties in recruiting and retaining staff over the past year, what are the primary reasons for this? Please Check All That Apply:

Staffing Challenges

Percentage of providers who report finding staff is easier than it was 90 days ago: 3%

“

We are offering \$10,000 sign on bonuses, complimentary child care for one child, min wage for non degree is \$16 and degreed is \$18, tuition reimbursement, benefits, etc and we still have a hard time filling our positions.

- Johnson County Provider

“

Former childcare workers who have left for food service and retail expect the same higher wage to consider coming back to childcare.

- Johnson County Provider

Key Takeaways

1

Access is elusive and inequitable.

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

These barriers are often most difficult to navigate for those experiencing other challenges.

2

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.'

3

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.

4

Supply: even fewer quality seats?

Providers routinely cite staffing as a challenge that reduces quality and leads to operating below capacity. **Supply is more nuanced than headline stats.**

Fiscal
Mapping
&
Cost
Modeling

Fiscal Mapping | Kansas counties

Data Sources

- Kansas Department for Children and Families
- Kansas Department of Education
- Child Care Aware of Kansas
- School district data
- Early Head Start/Head Start: The Family Conservancy
- Candid: Philanthropy Database

Fiscal Mapping | Missouri counties

Data Sources

- Office of Childhood: Child Care Subsidy Monthly Management Reports
- MO Department of Health and Senior Services
- Missouri Market Rate Survey
- Schools district data
- Early Head Start/Head Start: MARC
- Candid: Philanthropy Database

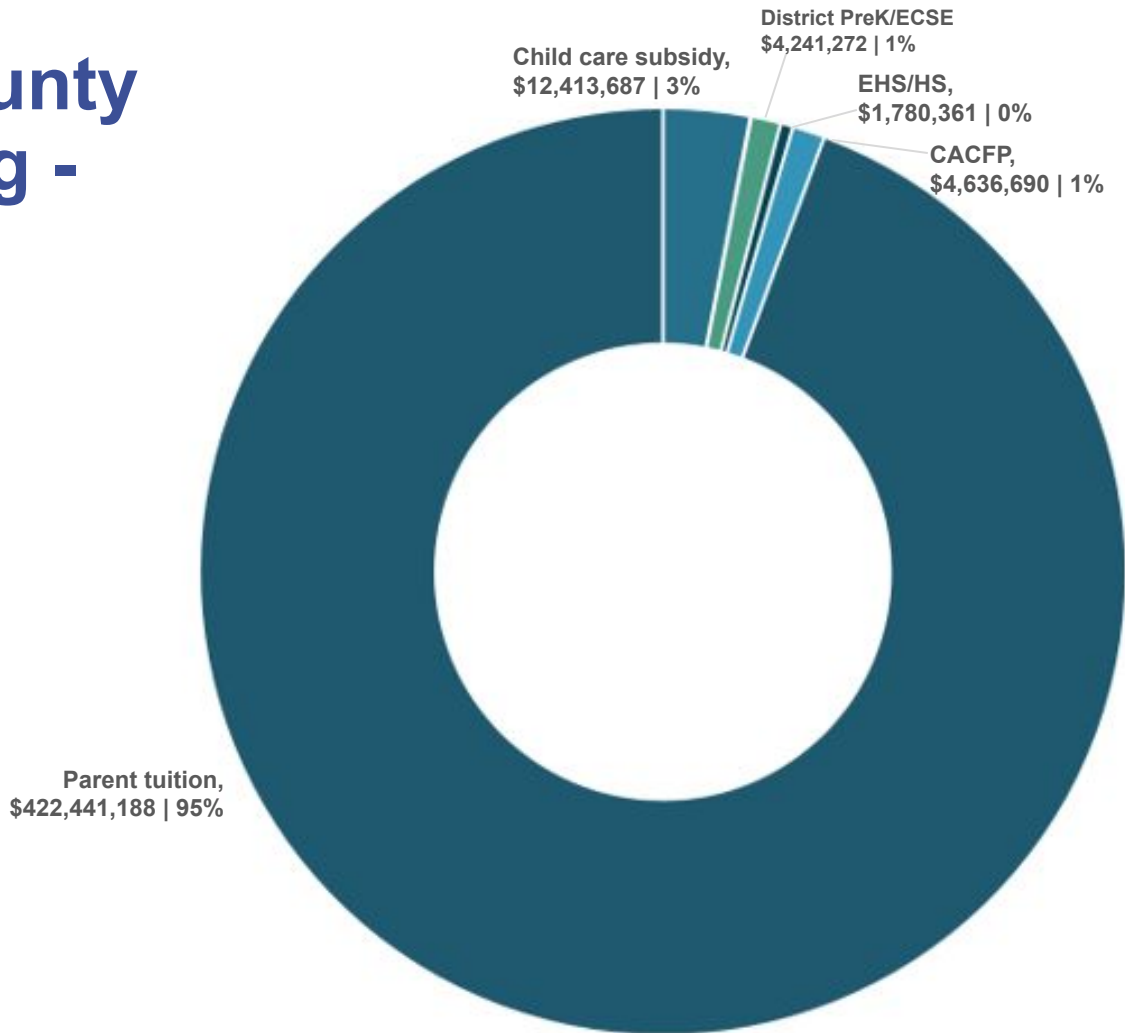
Tuition Rates | KC Metro

		INFANT & TODDLER WEEKLY	INFANT & TODDLER ANNUAL	PRESCHOOL WEEKLY	PRESCHOOL ANNUAL
KS	JOHNSON	\$313	\$16,276	\$248	\$12,896
	WYANDOTTE	\$219.50	\$11,414	\$179	\$9,308
MO	JACKSON	\$279.50	\$14,534	\$230	\$11,960
	CLAY	\$280	\$14,560	\$240	\$12,480
	PLATTE	\$280	\$14,560	\$240	\$12,480

Sources: Kansas Child Care Aware Point-in-Time (2024), Missouri Market Rate Survey (2024)

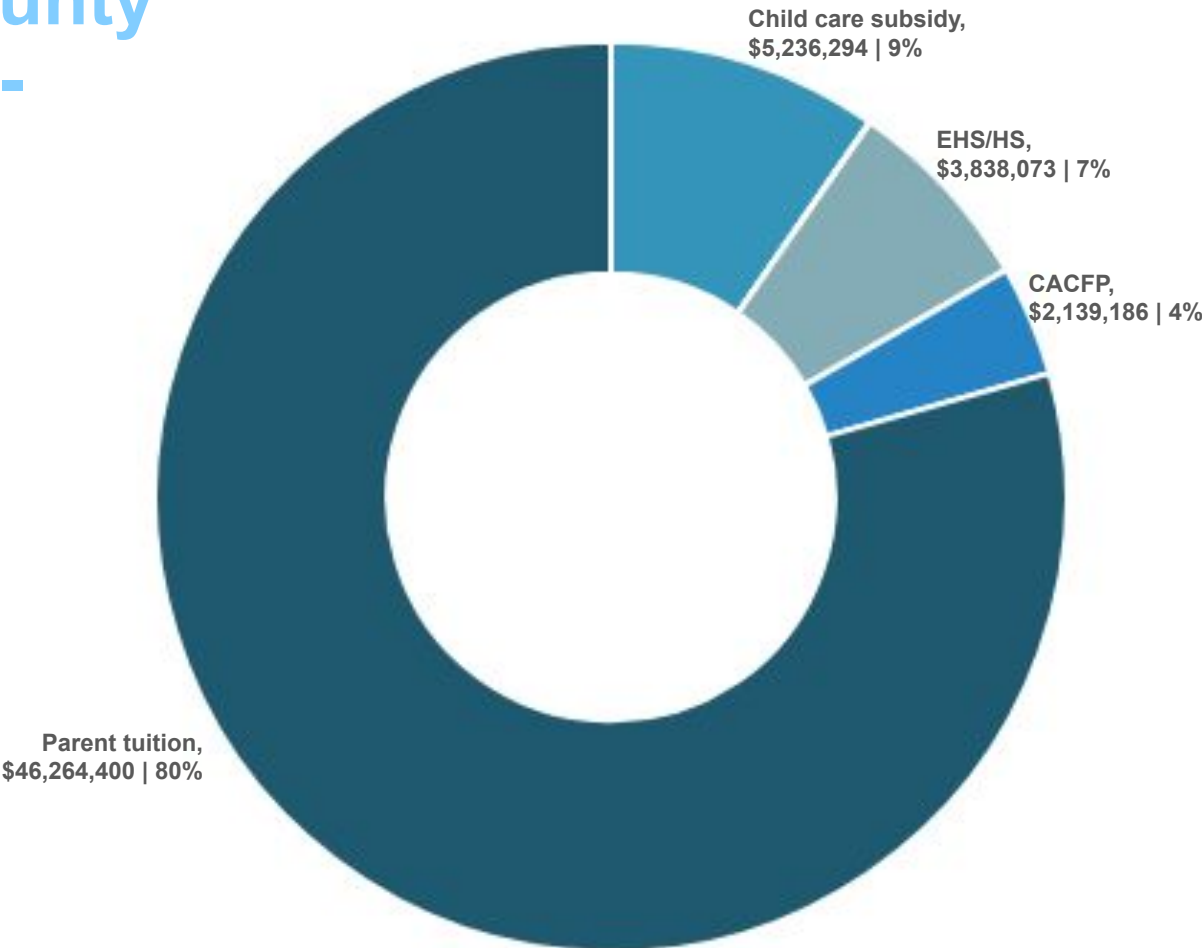
Johnson county ECE Funding - 2023

total funding:
\$445,650,179



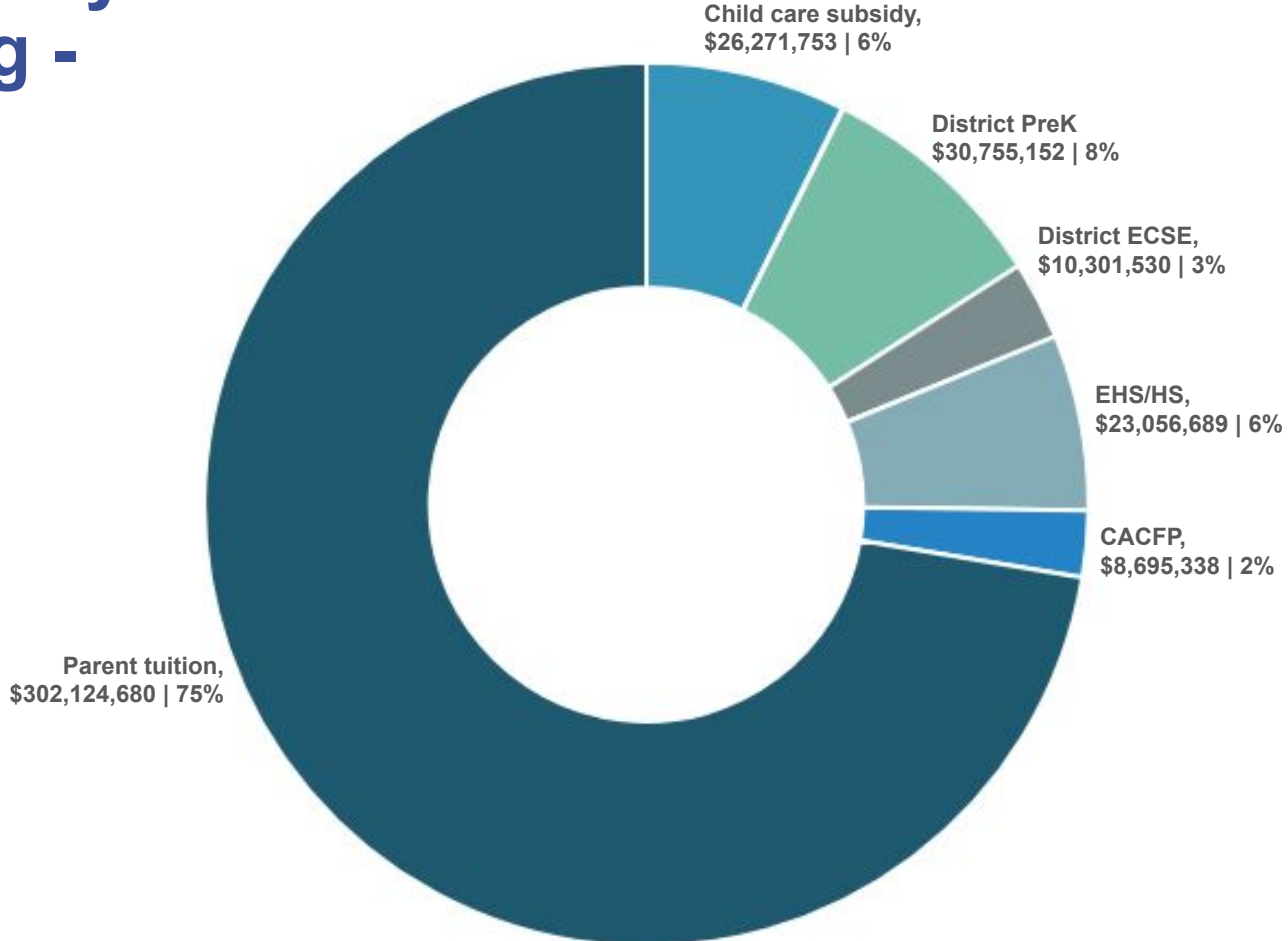
Wyandotte county ECE Funding - 2023

total funding:
\$57,477,953



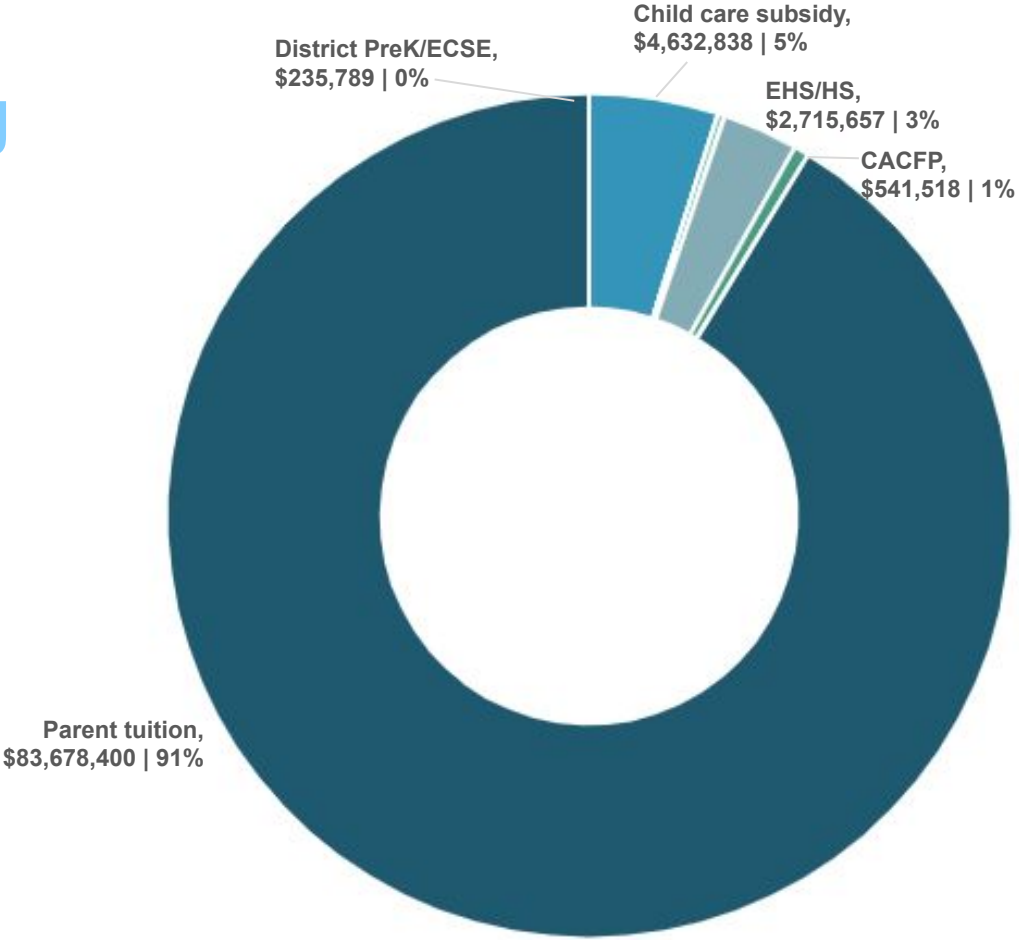
Jackson county ECE Funding - 2023

total funding:
\$401,317,192



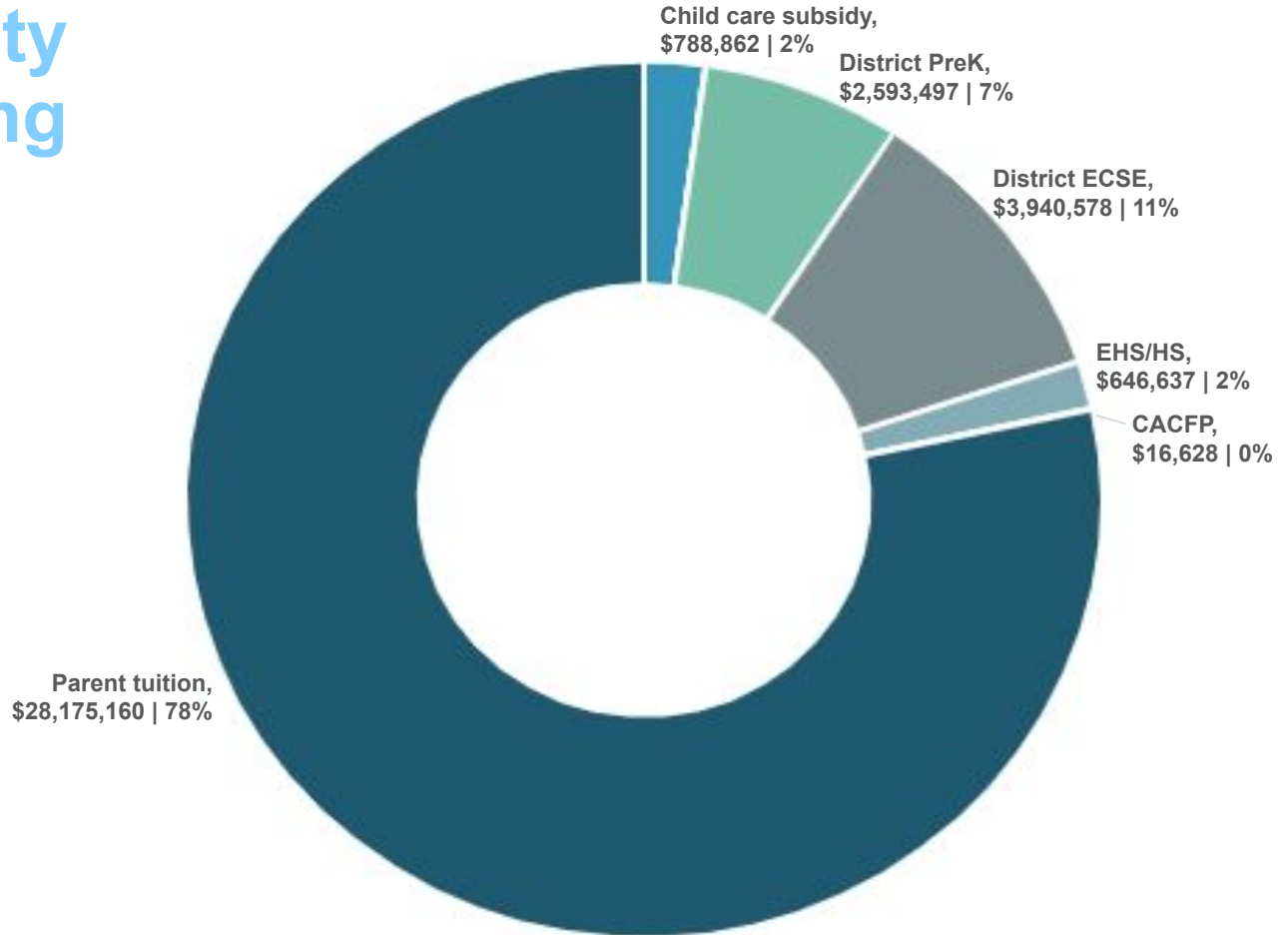
Clay county ECE Funding 2023

total funding:
\$91,811,703



Platte county ECE Funding 2023

total funding:
\$36,161,362



Fiscal Mapping | Key takeaways

- Budgets are not well-balanced among different funding streams
- Parents carry a heavy burden
- Opportunity to explore increasing subsidized care
- Early Head Start/Head Start - need for more slots
- Open the door: explore further philanthropic, local business, and civic support
- Kansas fiscal models: continue to update

Cost Modeling | Next steps

- Goal: What is the cost per child?
- Create baseline models and higher-level models
 - Models impacted by: tuition rates, salaries, program ratio and size, % subsidized care, enrollment, uncollected revenue, funds raised
- Provider input:
 - Are these the right benchmarks? What should a more ideal scenario include?
- Key questions:
 - Is there enough revenue to cover the cost of care?
 - Is the workforce appropriately compensated?
 - Is care affordable to families?
 - Are the programs financially sustainable?
 - Is there a balance between cost, quality, and affordability?

Addendum:
Insights on Care Quality
from Survey Data



What the survey can tell us about quality


Group discussion on Friday, June 28, 2024 indicated there was interest in a deeper dive into what the surveys can tell us about the importance of the quality of care. The surveys do have some insights for us to reflect on:

- **Parental hardship is due, in-part, to sacrifices made to satisfy quality standards:**
 - Parents elect higher prices and longer waitlists to satisfy their quality standards.
- **Quality is inseparable from supply:**
 - Even though there is a supply crunch, some providers self-report being under-enrolled (compared to capacity) due to lack of demand. *Total capacity of seats is not the same as total capacity of quality seats.*
 - Some providers self-report being under-enrolled (compared to capacity) due to lack of high quality staff candidates: *total capacity of seats is overstated because some providers are unwilling to compromise on staff quality.*

Survey question: 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.

Parental Challenges: Feedback on Quality

Our high level challenge question captures quality dissatisfaction through the “right provider” question. **1/3 of parents in the KC-study region tell us it is not easy to find the ‘right provider.’** Additionally, wait lists and affordability are a byproduct of quality concerns: parents tell us they endure these costs **so that** they can send their children to the right provider.

Statement	% who disagree or disagree strongly
It is easy to find a provider who does not have a waiting list for enrollment	67%
It is easy to find a provider who is affordable	59%
It is easy to find the right provider for my child(ren)'s needs	33% 
It is easy to find a provider whose availability fits my schedule	31%
It is easy to find a provider who is conveniently located for my family	31%

Survey question: 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 endure hardship to secure 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**.

The class sizes are too large for my child to feel cared for. For the centers that do have availability, the "teachers" do not seem to be properly trained or are not a good fit; in KS, it is hard to find something good that has availability.

- Johnson County Parent

We had, had him in a [in-home center], but it was not required to be licensed. It was small, the carpet was dirty, and the food offered was not healthy. The biggest challenge besides affordability now is that I don't have backup care when he is sick.

- Clay County Parent

I wanted to find a place where people truly care about the wellbeing of my child and not there just for a paycheck. When looking for these key things I found myself finding places that fit but was always told about a waitlist that I could be on for months.

- Wyandotte County Parent

Many providers are under enrolled due to lack of demand, which may be related to quality.

Looking at providers, it is important to remember that even though there is a huge supply crunch, $\frac{1}{4}$ of under-enrolled providers point to lack of demand as the cause. We don't have data on the reasons for lack of demand, but it's safe to assume that some of it is due to issues with parental perceptions of quality. We might think of some of this under-enrollment as a quality-driven reduction of supply: **low-quality seats are unlikely to be fully enrolled.**

If you're not serving your total allowed capacity, what is the reasoning?	
Lack of families enrolling	24%
Not enough staff to maintain classroom ratios	13%
Other	41%



Providers hold off hiring to maintain quality.

Providers are telling us that candidate-quality standards are a major obstacle to full-staffing, which in turn reduces available seats. We might think of as another quality-driven reduction of supply: **high-quality seats aren't created due to high-quality staff shortages.**

If you are a center director with staff, what is your current staffing situation?	
Finding qualified staff continues to be a challenge	39%
I am fully staffed	35%
I have open positions	35%
Finding staff is easier than it was 90 days ago	3%

“

One of the issues that keeps us from hiring staff is the inability for person to clear a federal background investigation. Too many ppl have defaulted on school loans or have not filed/paid their taxes.

- Johnson County Provider

If you are a center director, what is your current staffing situation? Please Check All That Apply: