



# Stone & Taney Counties Early Childhood Community Data Community Planning Process 2025 March - Present

# agenda

1. Welcome
2. Data overview
3. Survey insights
4. Fiscal map & cost models
5. Discussion
6. Next steps

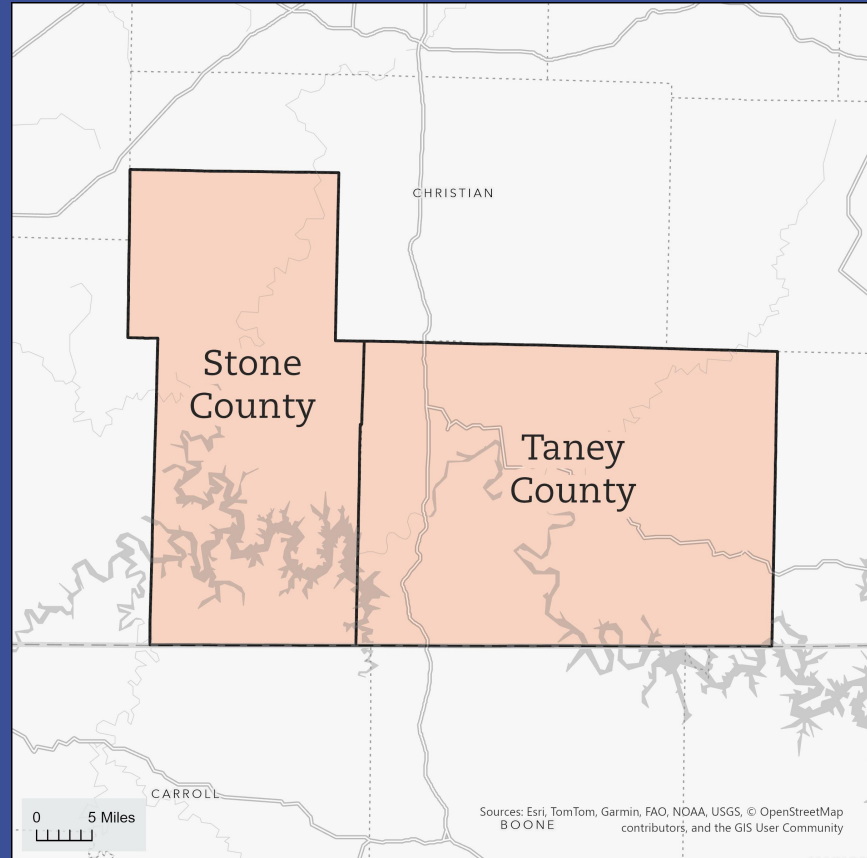
# COMMUNITY TEAM

Meeting #2  
07.24.25

**Our goal today is to share what is happening in your community's child care landscape.**

# Study Area

## Stone & Taney Counties



# 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
  - o Child Care Aware list of providers
  - o Local contacts for HS/EHS slots
  - o Missouri DSS Block Grant Child Care Monthly Management Report for State Subsidy data
- Family need and workforce characteristics
  - o American Community Survey 5-year estimates
  - o Esri demographic estimates
  - o Bureau of Labor Statistics Longitudinal Employer-Household Dynamics (LEHD, 2022)



# Key findings

- **Increase Total Capacity:**
  - About 1,400 more slots for Infants and Toddlers are needed.
  - Pre-K slots (ages 4-5) are well-matched to community need, but additional Preschool slots (ages 3-5, year round care) are needed.
- **Expand Access to Income-based Programs:**
  - Many more kids (hundreds!) are eligible for Early Head Start, Head Start and State Subsidy programs than are currently accessing those programs.
- **Population Trend:** The number of kids ages 0-5 in households with all parents working outside the home has increased in both counties.



# 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
<b>STONE &amp; TANEY</b>	<b>7</b>	<b>20</b>	<b>0</b>	<b>3</b>
STONE	1	8	0	0
TANEY	6	12	0	3

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)	STONE & TANEY	<b>321</b>	<b>56</b>	<b>12</b>	<b>92</b>
	STONE	75	8	0	0
	TANEY	246	48	12	92
PRESCHOOL (3-5 YEARS)	STONE & TANEY	<b>1,514</b>	<b>75</b>	<b>54</b>	<b>102</b>
	STONE	448	15	4	0
	TANEY	1,066	60	50	102

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)	STONE & TANEY	<b>1,756</b>	<b>319</b>	<b>718</b>
	STONE	495	106	249
	TANEY	1,261	213	469
PRESCHOOL (3-5 YEARS)	STONE & TANEY	<b>1,795</b>	<b>331</b>	<b>736</b>
	STONE	503	112	253
	TANEY	1,292	219	483

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



# Gap in total slots - infant & toddler

		NUMBER OF SLOTS, TOTAL	NUMBER OF KIDS WHO NEED CARE	GAP IN SLOTS, TOTAL	PERCENT SERVED
INFANT & TODDLER (BIRTH-2 YEARS)	STONE & TANEY	<b>321</b>	<b>1,756</b>	<b>-1,435</b>	<b>18%</b>
	STONE	75	495	-420	15%
	TANEY	246	1,261	-1,015	19%

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



# Gap in total slots - preschool and pre-K

		NUMBER OF SLOTS, TOTAL	NUMBER OF KIDS WHO NEED CARE	GAP IN SLOTS, TOTAL	PERCENT SERVED
PRESCHOOL (3-5 YEARS)	STONE & TANEY	<b>1,514</b>	<b>1,795</b>	<b>-280</b>	<b>84%</b>
	STONE	448	503	-55	89%
	TANEY	1,066	1,292	-225	83%
PRE-K (4-5 YEARS)	STONE & TANEY	<b>687</b>	<b>595</b>	<b>92</b>	<b>115%</b>
	STONE	239	168	71	142%
	TANEY	448	427	21	105%

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)	STONE & TANEY	<b>56</b>	<b>319</b>	<b>-263</b>	<b>18%</b>
	STONE	8	106	-98	8%
	TANEY	48	213	-165	23%
PRESCHOOL (3-5 YEARS)	STONE & TANEY	<b>75</b>	<b>331</b>	<b>-256</b>	<b>23%</b>
	STONE	15	112	-97	13%
	TANEY	60	219	-159	27%

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)	STONE & TANEY	<b>12</b>	<b>718</b>	<b>-706</b>	<b>2%</b>
	STONE	0	249	-249	0%
	TANEY	12	469	-457	3%
PRESCHOOL (3-5 YEARS)	STONE & TANEY	<b>54</b>	<b>736</b>	<b>-682</b>	<b>7%</b>
	STONE	4	253	-249	2%
	TANEY	50	483	-433	10%

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



# Family characteristics Data & 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 (2023)*



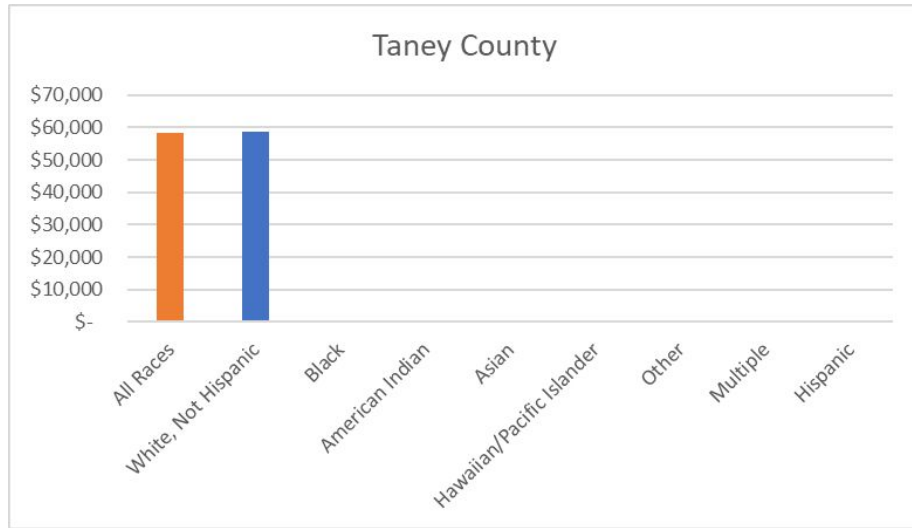
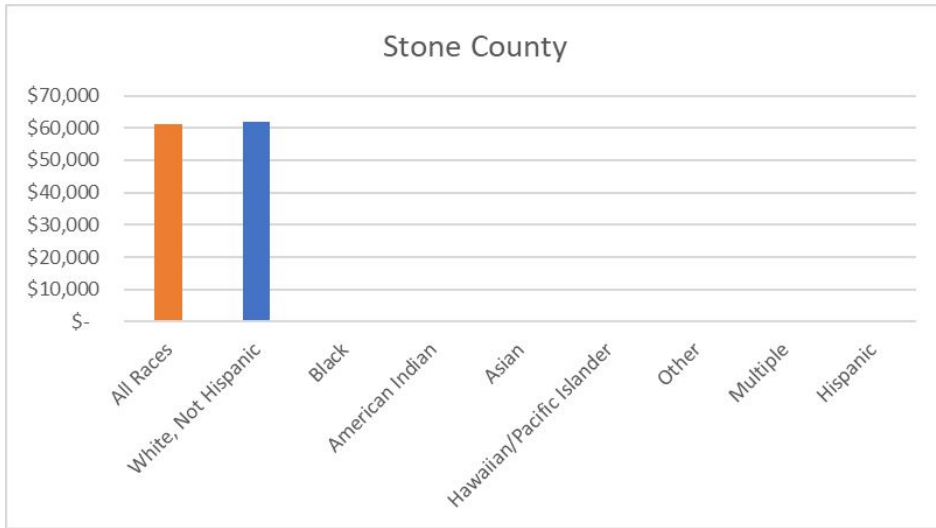
# Household characteristics

	Median Household Income			Population 0-5			Children 0-5 with All Parents Working		
	2018 (IN 2023 DOLLARS)	2023	% Change	2018	2023	% Change	2018	2023	% Change
Stone County	\$46,443	\$61,323	32%	1,364	1,415	4%	664	723	9%
Taney County	\$41,487	\$58,258	40%	3,561	3,467	-3%	2,284	2,397	5%



# Median Household Income, 2023 by race or ethnicity

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



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



# County characteristics

## by race & ethnicity

	Total Population			Population White, Not Hispanic			Population Other than "White, Not Hispanic"		
	2018	2023	% Change	2018	2023	% Change	2018	2023	% Change
Stone County	31,527	31,697	1%	29,944	29,633	-1%	1,583	2,064	30%
Taney County	54,720	56,382	3%	48,718	48,248	-1%	6,002	8,143	36%



# Study area workers - Stone County

Live and work in Stone County	2,920	22.4%
Work in Greene County and live in Stone County	3,002	23.1%
Work in Taney County and live in Stone County	2,314	17.8%
Work in Christian County and live in Stone County	780	6.0%
Live in Taney County and work in Stone County	1,309	18.8%
Live in Christian County and work in Stone County	681	9.8%
Live in Greene County and work in Stone County	608	8.7%

More residents commute out of the county for work than the number of workers that commute in from nearby counties.



# Study area workers - Taney County

Live and work in Taney County	14,133	56.8%
Work in Greene County and live in Taney County	3,356	13.5%
Work in Stone County and live in Taney County	1,309	5.3%
Live in Stone County and work in Taney County	2,314	8.8%
Live in Christian County and work in Taney County	1,858	7.1%
Live in Greene County and work in Taney County	1,755	6.7%

Nearly 6,000 people commute in to Taney County for work while 4,665 commute out to other counties.



# Top employers - Stone County

Employer	Sector	Employees
Silver Dollar City	Arts, Entertainment & Recreation	375 + a few hundred seasonal (10.5 months)
Reeds Spring School District	Educational Services	360
Walmart Supercenter	Retail Trade	348
Blue Eye School District	Educational Services	170
Stone County Government	County Government	150
Keller Williams Tri-Lakes	Real Estate, Rental & Leasing	135
Crane R-II School District	Educational Services	100
Stormy Point Village	Accommodation & Food Services	100
Table Rock Resorts	Accommodation & Food Services	75
Galena School District	Educational Services	70
Stone County Sheriff	Public Administration	60
Richmond Monroe Group	Document Preparation Services	50
Stonebridge Villa POA	Residential Property Managers	50

Source: Table Rock Lake Chamber of Commerce.



# Top employers - Taney County

Employer	Sector	Employee Size Range
Cox Medical Center Branson	General Medical And Surgical Hospitals	1000 to 4999
Big Cedar Lodge	All Other Traveler Accommodation	500 to 999
Coxhealth Cancer Center-Branson	Specialty (Except Psychiatric And Substance Abuse)	500 to 999
Keeter Center At College of The Ozarks	Hotels (Except Casino Hotels) And Motels	500 to 999
76 Music Hall	All Other Traveler Accommodation	250 to 499
Club Wyndham Branson At The Meadows	All Other Traveler Accommodation	250 to 499
Summer Winds Resort	Hotels (Except Casino Hotels) And Motels	250 to 499
Cabins At Green Mountain	All Other Traveler Accommodation	250 to 499
Bass Pro Shops	Sporting Goods Retailers	250 to 499
Chateau On The Lake Resort Spa	Hotels (Except Casino Hotels) And Motels	250 to 499

Source: Taney County, Taney County Partnership



# SURVEY INSIGHTS

# Research Scope

This report focuses on qualitative community survey research of parents and employers based or working in Stone and Taney counties.

## Parents of children ages 5 and under (n=65 surveyed, Stone=17, Taney = 48):

- 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=14):

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

## ECE Directors and Owners (n=5)

- KidsWin/IFF Surveys April-June 2025.

# Key Takeaways

1

Access is elusive and inequitable.

Getting a seat is difficult, especially for parents with infants. **The biggest barriers are long waitlists and high prices.** The cost of care is a significant barrier and even prevents parents from enrolling in childcare.

2

Access is limited by availability of care.

Even when parents are able to find care, they often make changes at work, such as shifting schedules and create a balancing act with their partner's schedule to **accommodate shift schedules.**

3

Providers face unique challenges.

**Providers face challenges finding and retaining staff.** The ability to retain staff is a challenge further heightened by several shift industries in the area.

4

Employers: hurt but unhelpful

Costs are recognized as significant, but there are few plans to invest in care. Employers in the Education sector have been more able to provide childcare benefits than other sectors.

**Who are the  
Parents?**

# Demographics of Respondents

Income Level	% of respondents
\$20,000 or less	5%
\$20,001 to \$40,000	30%
\$40,001 to \$60,000	22%
\$60,001 to \$80,000	17%
\$80,001 to \$100,000	17%
\$100,001 to \$150,000	17%
\$150,000 to \$200,000	9%
\$200,001 to \$250,000	2%
\$250,001 or more	0%

*Survey median is in the upper range of the county median\*: \$60k*



*\*average of the medians for the two counties*

# Demographics of Respondents

Race/Ethnicity	% of respondents
American Indian and Alaska Native	0%
Asian	0%
Black or African American	0%
Hispanic or Latino	3%
Multiracial or Biracial	11%
Native Hawaiian and Other Pacific Islander	0%
White	85%

*Multiracial or Biracial  
overrepresented in the Count.*



**Parents:  
what is their  
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	71%
It is easy to find a provider <b>who is affordable</b>	69%
It is easy to find a provider who is <b>conveniently located</b> for my family	50%
It is easy to find a provider whose <b>availability fits my schedule</b>	45%
It is easy to find the right provider with a <b>program or approach that meets my specific needs</b> (for example, equipped to meet my child's special needs, speak my preferred language, match my preferred teaching style, etc.)	43%
It is easy to find the a provider who meets my <b>quality standards</b>	40%

*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 make sacrifices due to affordability and access access.

I recently turned down a new job offer because the childcare was going to cost me approximately \$20,000 annually for my children, which would have more than offset any pay increase I was going to receive.

- Stone County Parent

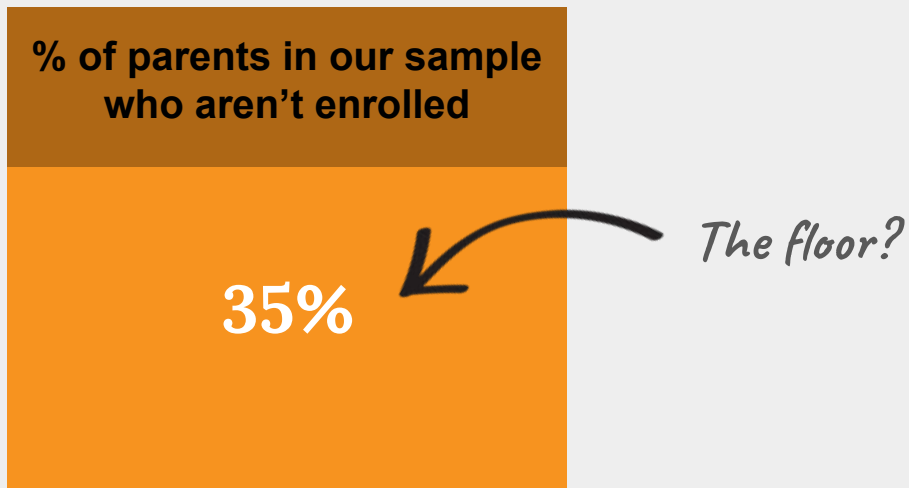
I have had to reduce my hours that way I can work around my husband's schedule so one of us is always home. This also makes it where our kids don't have both parents at home anymore at any given time.

- Taney County Parent

I really feel that if both parents are working full time, one will always have to be the one that sacrifices their work for their child. I am the one who will have to leave early, come in late, unexpectedly take days off.

- Stone County Parent

# Who is being left out?



*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**

**35%**

“  
Most child care around the area are only open till 5pm, no after [hour] child care available in the area. And very expensive.

- **Taney County Parent**

“  
So far the cost has been the biggest factor...if our working situation was to change, from others I have talked to, it would not make financial sense for us to place our kids in childcare. One of us would quit our job and be a full time stay at home parent.

- **Stone 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**

**62%**

*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**

**62%**

“  
The stress of waiting and trying to find temporary childcare made it so hard to work...we were on about 4 waitlists and couldn't be picky.

- **Taney County Parent**

“  
Every daycare I contacted, they had no openings for under 2 year [olds]. Very frustrating.

- **Taney County Parent**

“  
I had to travel an hour every morning to drop off my child to in-laws.

- **Stone 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 '\$664' in white.

\$664

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

A large light blue square with a white border, containing the text '\$602' in white.

\$602

**Twos**  
(2-3)

A large yellow square with a white border, containing the text '\$400' in white.

\$400

**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 pay the bill.



I've had to get a second job to try and get some extra income in order to feel secure in case I lost my primary job due to the child care scheduling conflicts.

**-- Taney County Parent**



# Navigating the system: Performance at Work

Thinking about the challenges you may have experienced at work in order to accommodate child care availability, which of the following have you or another adult member of your household experienced?

*Other? 8%*

Left work earlier than normal	<b>63%</b>
Been late for work	<b>55%</b>
Missed one or more full shifts of work	<b>46%</b>
Distracted to the point of being unproductive	<b>23%</b>

*IFF/KidsWin Parent Survey: Thinking about the challenges you may have experienced at work in order to accommodate child care availability, which of the following have you or another adult member of your household experienced?*

# Navigating the system: Career Outcomes

Which of the following work experiences have you or another adult member of your household experienced to accommodate child care?

<b>Compensation &amp; Hours</b>	Changed work schedule	48%
	Reduced total working hours	43%
	Reduced pay	17%
	Started to work-from-home without changing employers	9%
<b>Career Development</b>	Turned down a new job offer or promotion	23%
	Took a new job solely to accommodate care	22%
	Turned down or stopped pursuing further education	20%
	Demoted	0%
<b>Separations</b>	Quit a job	12%
	Been let go or fired	5%

*None of the Above? 32%*

*Other? 2%*

*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.*

# Navigating the system: Costs at Home

Thinking about the changes to your home or personal life you may have made in order to accommodate child care availability, which of the following have you or another adult member of your household experienced?

Experienced harm to the health or happiness of important relationships	<b>20%</b>
Experienced harm to mental health	<b>20%</b>
Moved to a new home	<b>14%</b>
Moved in with relatives, or had relatives move into your home	<b>14%</b>

*Other? 14%*

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

## Access challenges reverberate through lives.

“

Until January of this year, my husband has had to keep our son while he tries to work a call center job from home. This has resulted in massive frustration, my house being destroyed because our 3 year old could not be focused on while my husband was on a phone call....Getting in trouble at work because of background noise...missed work or not being available for work requirements. My husband missed out on a promotion due to his availability.

-- Taney County Parent

”

**Employers:  
what is their  
experience?**

# Childcare is a recognized challenge, and most organizations feel significant 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	<b>33%</b>
<b>Significantly</b> - employees' access to child care causes moderate challenges for my business	<b>23%</b>
<b>Somewhat</b> - employees' access to child care causes some challenges for my business	<b>27%</b>
<b>Slightly</b> - employees' access to child care causes minor challenges for my business	<b>13%</b>
<b>Not at all</b> - employees' access to child care does not cause challenges for my business	<b>3%</b>

*56% are in the top two boxes.*

*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.*

# Zooming in: Perceptions of Workforce Costs

To the best of your knowledge, how much does your employees' access to child care affect the following dimensions of your business:	% Answering Greatly or Significantly	% Answering Not at All
<b>Your ability to set schedules</b>	<b>38%</b>	<b>14%</b>
<b>Your ability to operate at full capacity</b>	<b>48%</b>	<b>17%</b>
<b>Your ability to hire staff</b>	<b>52%</b>	<b>21%</b>
<b>Your ability to retain employees</b>	<b>54%</b>	<b>21%</b>

*IFF/KidsWin Employer Survey: IFF/KidsWin Employer Survey: To the best of your knowledge, how much does your employees' access to child care affect the following dimensions of your business.: ...*

# 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	<b>70%</b>
Employees trading shifts with co-workers, or otherwise temporarily changing their work hours / availability	<b>42%</b>
Employees terminating their employment	<b>33%</b>
Employees permanently changing their work hours / availability	<b>30%</b>
Candidates declining employment offers	<b>24%</b>
None of the above	<b>9%</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

The stress for young parents could cause them to be unproductive. Many employees work schedules have been an issue. We have had several employees state their reason for leaving was so they could be closer to family to help with childcare needs.

- **HR staff in Government**

It is hard to find quality childcare in our area for "off-hours" but because of tourist-related businesses, parents work at all hours, except overnights around here.

- **HR Director in Tourism**

...employment and staffing are a concern. Teachers who have young children (0-5) need childcare to continue working. We started a daycare two years ago because we were going to lose good, young teachers who needed childcare to continue working.

- **Superintendent in K-12 Education**

**Providers:  
what is their  
experience?**

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

The providers surveyed report having a waiting list of children, echoing parents' experiences, yet report are not at capacity.

“Providing quality childcare with low child to teacher ratio”

“Natural enrollment fluctuations due to tourism industry in Branson.”

“Still new and growing. We do not accept subsidy pay.”

“Transient population”

*IFF/KidsWin Provider Survey: What is your total capacity to care for each of the following age groups across your child care or early learning location(s)?*

*IFF/KidsWin Provider Survey: Please share more about any difference between the capacity and actual enrollment at your child care or early learning location(s). What factors contribute to this difference?*

# Providers report one or more major challenges to hiring.

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

Applicants are unqualified for the work	<b>100%</b>
Not enough applicants for open positions	<b>40%</b>
Applicants do not accept offers	<b>20%</b>
Other	<b>0%</b>
None of the above	<b>0%</b>

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

# Providers report one or more major challenges to retaining staff.

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

Staff leaving to take positions elsewhere	<b>80%</b>
Staff having to be let go due to performance issues	<b>20%</b>
Staff leaving for their own health reasons	<b>20%</b>
Staff leaving to retire	<b>20%</b>
Staff leaving to care for their own children/family members	<b>20%</b>
Other	<b>0%</b>
None of the above	<b>0%</b>

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

# Key Takeaways

1

Access is elusive and inequitable.

Getting a seat is difficult, especially for parents with infants. **The biggest barriers are long waitlists and high prices.** The cost of care is a significant barrier and even prevents parents from enrolling in childcare.

2

Access is limited by availability of care.

Even when parents are able to find care, they often make changes at work, such as shifting schedules and create a balancing act with their partner's schedule to **accommodate shift schedules.**

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Providers face unique challenges.

**Providers face challenges finding and retaining staff.** The ability to retain staff is a challenge further heightened by several shift industries in the area.

4

Employers: hurt but unhelpful

Costs are recognized as significant, but there are few plans to invest in care. Employers in the Education sector have been more able to provide childcare benefits than other sectors.

# FISCAL MAP & COST MODELS

# Tuition data

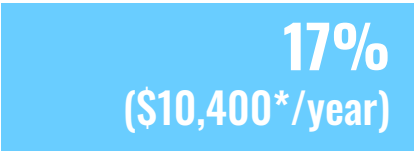
median household income (MHI)



% annual income parents pay for infant & toddler care



% annual income parents pay for preschool care

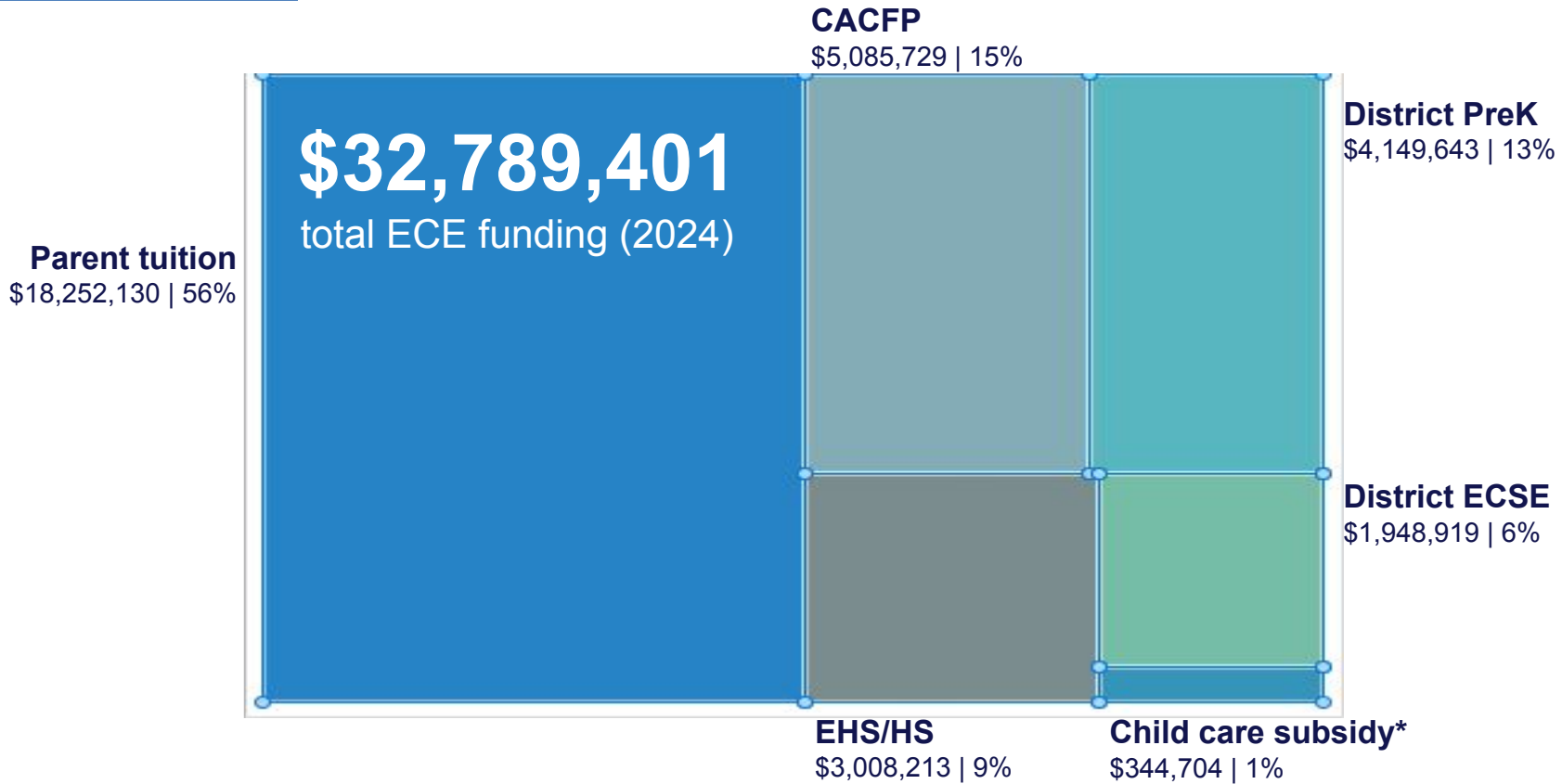


affordable cost level (7% MHI)



*\*Based on 100% of 2024 market rate as determined by the Office of Childhood through the market rate survey. Actual tuition rates could be higher or lower within individual programs.*





\*Subsidy data last available Jan 2023-Dec 2023  
via MO DSS Child Care Monthly Management Reports



# Reflections on the map, fiscally speaking

Is it a balanced system?

Who carries the heaviest load?

How can we make this more aligned?



## Parents do!

Infant/toddler tuition:

**\$293/week\*** → **\$15,210/year**

Preschool tuition:

**\$200/week\*** → **\$10,400/year**

Currently no philanthropic or business dollars flowing into the system

Total flowing into your community (2024): **\$2,288,897**

Total spent on ECE specific programs (2024): **\$0**

Who makes up your **local philanthropic community**?

How can philanthropy be at the table?

What are the opportunities to engage/co-design?

*\*Actual tuition rates could be higher or lower within individual programs.*



# Why cost models?



**tuition  
rate**

what the local  
market can bear

**cost**

actual expenses to  
operate a program

**true  
cost  
of care**

estimated cost to  
operate a **high-quality**  
program with an  
increased, sustainable  
**workforce  
compensation**

Tuition Rate	Cost of Care	True Cost of Care
<p><b>Current provider rate</b></p>	<p><b>BASELINE program model</b> what it costs to operate a program (well....almost)</p>	<p><b>PLUS program model</b> a complete picture of what it costs to operate a: -high-quality program -sustainable, fully compensated workforce</p>
<p>- <b>providers are only willing</b> to charge what they <b>know parents can pay</b></p>	<p>Does <b>NOT</b> include:</p> <ul style="list-style-type: none"> <li>- benefits (health, dental)</li> <li>- Paid time off (PTO)</li> <li>- \$\$\$ to support professional development/training of staff</li> </ul>	<p><b>Includes:</b></p> <ul style="list-style-type: none"> <li>- Benefits (\$6,650/empl/year)</li> <li>- 3 weeks PTO/empl/year</li> <li>- professional development (\$1,000/empl/year)</li> </ul>
	<p><b>Low salaries</b> - mostly below living wage</p> <ul style="list-style-type: none"> <li>- Director - \$44,720</li> <li>- Lead teacher - \$35,360</li> <li>- Assistant teacher - \$15.00/hour</li> </ul>	<p>Increased <b>living wage salaries</b></p> <ul style="list-style-type: none"> <li>- Director - \$58,280</li> <li>- Lead teacher - \$38,480</li> <li>- Assistant - \$16.50/hour</li> </ul>

Notes:

1. Salary for home-based directors was not included in either the Baseline/Cost or PLUS/True Cost of Care Family Child Care models.
2. Weekly and annual tuition rates are based on 100% of 2024 market rate as determined by the Office of Childhood through the market rate survey. Actual tuition rates could be higher or lower within individual programs.
3. Data sources: 2025 Community Provider Stakeholder Surveys; MIT Living Wage Calculator; Provider Cost of Quality Calculator

# For-profit center, mid-sized

56 total children  
16: IT  
40: Preschool

## For-profit program<sup>(def)</sup>:

-charges tuition with the goal of recovering costs and generating revenue

-balancing quality care with profit margins is crucial for sustainability

	PRICE (Current “provider rate”)	COST (Baseline)	TRUE COST OF CARE (“PLUS”)
<b>Tuition</b>			
Infant/toddler (0-2 years)	\$15,210	\$17,426	\$21,728
Preschool (3-5 years)	\$10,400	\$10,766	\$12,717
<b>Net revenue</b>			
			<b>-\$283,470</b>

# Nonprofit program, mid-sized

56 total children  
16: IT  
40: Preschool

## Nonprofit program<sup>(def)</sup>:

-mission-driven; focused on providing services over generating revenue

-tax exempt

-typically funded through donations, grants, and/or government support

	PRICE (Current “provider rate”)	COST (Baseline)	TRUE COST OF CARE (“PLUS”)
<b>Tuition</b>			
Infant/toddler (0-2 years)	\$15,210	\$17,426	\$21,728
Preschool (3-5 years)	\$10,400	\$10,766	\$12,717
<b>Net revenue</b>			
			<b>-\$313,878*</b>

*\*This is typically the amount a program would fundraise to break even.*

# Family child care program

**10 total children**  
**4: IT**  
**6: Preschool**

-1,500 sq ft home  
 (80% space used for care)

-1 assistant

-Net revenue in both models represents the amount a home-based provider may be paid in salary or reinvest in their program.

-Salary is not included in either the Cost/Baseline or True Cost of Care model.

	<b>PRICE</b> (Current “provider rate”)	<b>COST</b> (Baseline)	<b>TRUE COST OF CARE</b> (“PLUS”)
<b>Tuition</b>			
Infant/toddler (0-2 years)	\$15,210		
Preschool (3-5 years)	\$10,400		
Cost per child		\$6,922	\$8,871
<b>Net revenue</b>			
		\$16,191	<b>-\$3,305</b>

# Cost Modeling: Key Takeaways

- Fully staffed = fully enrolled
- Quality + affordability = family retention (leading to full enrollment)
- Blending/braiding funds = more revenue overall
- More revenue = higher teacher compensation + deeper training (= retention)
- Teacher quality = program quality



What are your initial reactions or thoughts regarding the data?

What's bubbling to the surface?

What's the good, the bad, the beautiful, the ugly?

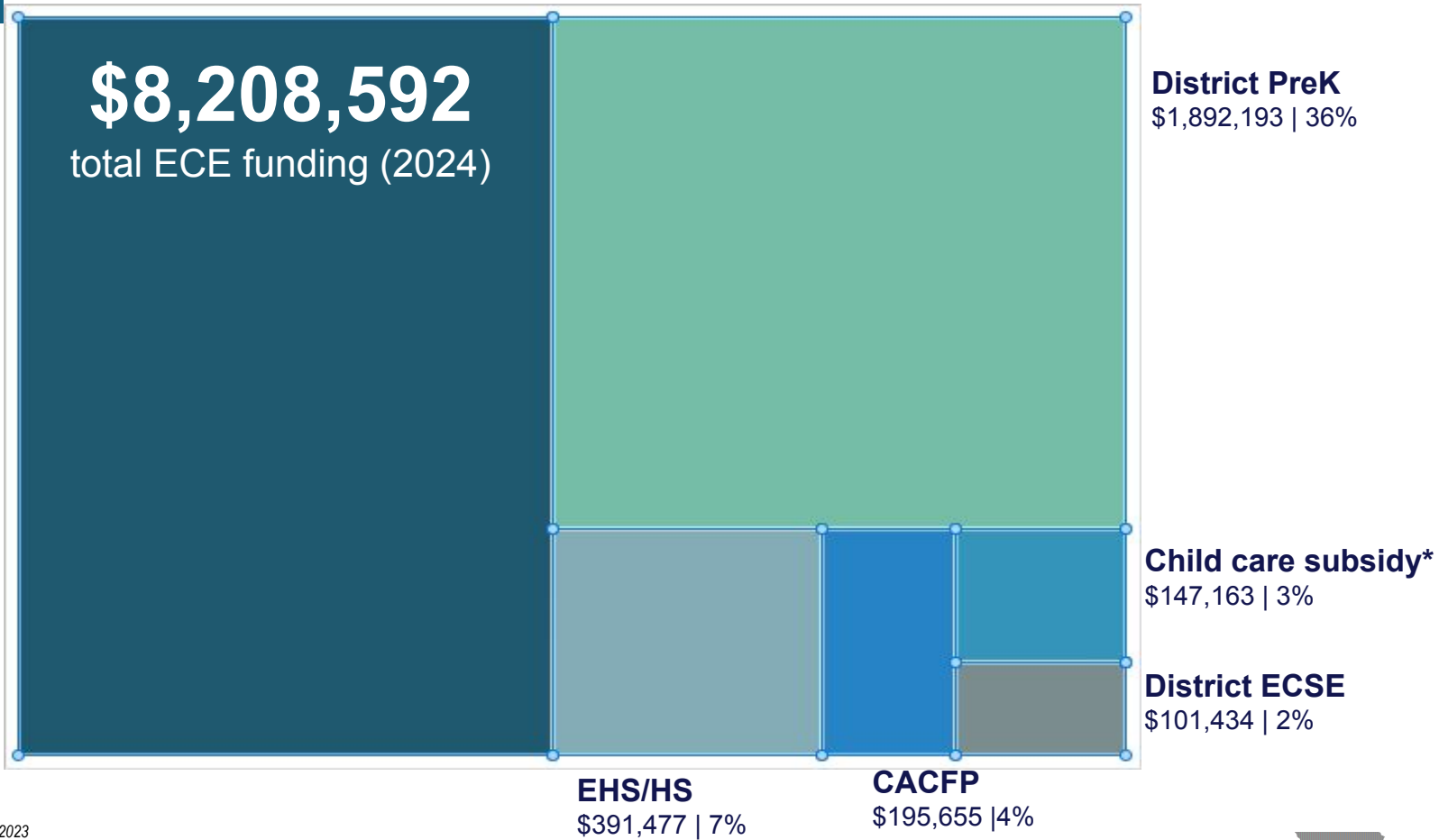
What specific issues can you identify based on the data you learned about today?



# Action Steps:

- Review the data; share your thoughts/feedback
- Complete Top Priority survey
- **Team Meeting #3:**  
September 23 | 9a-11:30a  
Location: TBD

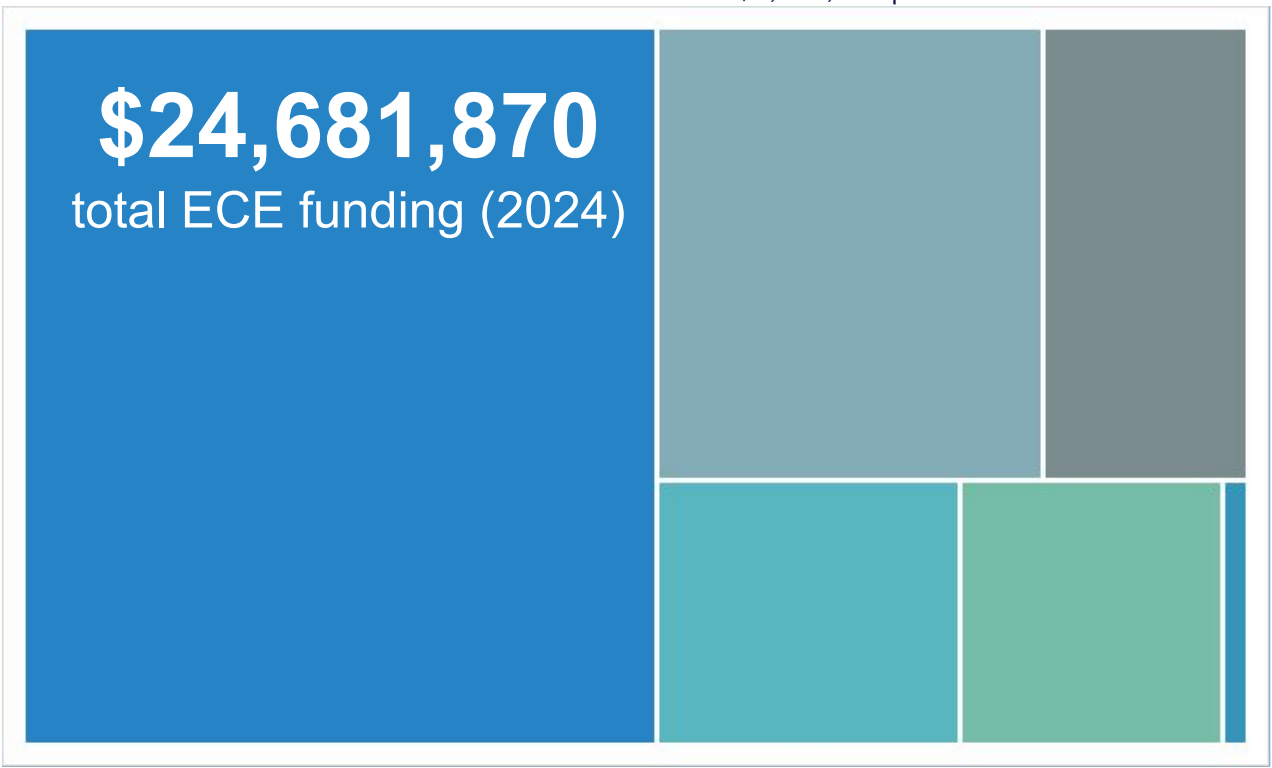
# ADDENDUM



\*Subsidy data last available Jan 2023-Dec 2023  
via MO DSS Child Care Monthly Management Reports



**CACFP**  
\$4,889,764 | 20%



**Parent tuition**  
\$12,771,460 | 52%

**\$24,681,870**  
total ECE funding (2024)

**EHS/HS**  
\$2,616,736 | 11%

**Child care subsidy\***  
\$197,541 | 1%

**District PreK**  
\$2,257,450 | 9%

**District ECSE**  
\$1,948,919 | 8%

*\*Subsidy data last available Jan 2023-Dec 2023 via MO DSS Child Care Monthly Management Reports*



# agenda

1. Welcome
2. Key Findings/Priorities
3. Strategy brainstorm
4. Review of existing strategies
5. Ranking
6. Next steps

# COMMUNITY TEAM

Meeting #3  
09.23.25

**Our goal today is to work together to identify the best strategies that will address our community's early childhood priorities.**

# Priority Review

## Stone & Taney Counties

1. Increase public-private partnerships to support the child care system.
2. Support existing child care providers to ensure sustainability, and then focus on increasing the supply of quality infant-toddler care.
3. Ensure child care providers and families are accessing and utilizing all currently available supports and resources.
4. Increase supportive policies and public investment in child care at all levels.



# Strategy Brainstorm

- **What are the outcomes we are trying to achieve within each priority, and overall?**
- **What activities could get us there?**

**For example:**

**Outcome= higher teacher wages**

**Activity= ???**



# Strategy Ranking

**Select the top 3 strategies within each priority area that you are most interested in learning more about and/or pursuing in the community.**



# agenda

1. Welcome
2. Year in Review
3. Strategy Overview
4. Next steps

# COMMUNITY TEAM

Meeting #4  
Dec. 2025

**Our goal today is to  
celebrate the work you  
have done as a team and  
share next steps!**

# Year in Review



# Priority Review

## Stone & Taney Counties

1. Increase public-private partnerships to support the child care system.
2. Support existing child care providers to ensure sustainability, and then focus on increasing the supply of quality infant-toddler care.
3. Ensure child care providers and families are accessing and utilizing all currently available supports and resources.
4. Increase supportive policies and public investment in child care at all levels.



# Strategy Overview

## Stone & Taney Counties

1. Child Care Works: Community of Practice
2. Workforce Development Research & Planning
3. Revenue Research
4. Ongoing ECE Advocacy



# Strategy Overview

## **Child Care Works: Community of Practice**

- Deep dive into the cost sharing model (including requirements around state funds)
- Process to collectively design a model that will work for your community
- COP will include lead organization, child care provider, & business owners/representatives
- Kick-off is January 2026



# Strategy Overview

## Workforce Research & Planning

- Convene appropriate stakeholders to map out existing programs and resources before designing a local approach
- Align with OOC's initiatives (if funded)
- Includes facilitation & research support
- Kick-off is March/April 2026



# Strategy Overview

## Revenue research

- Kids Win MO is working with MO Budget Project to dig into any potential public revenue streams that could support child care.
- Kick-off is January 2026



# Strategy Overview

## Ongoing Advocacy

- The team needs to continue educating policymakers about this work.
- KWM recommends visiting the Capitol 1-2 times per year, participating in Child Advocacy Day, media outreach, and hosting local meetings with legislators.
- Ongoing in 2026



# Next Steps

**2025**

- **Determine CCW COP participants**

**2026**

- January: CCW COP & Revenue Research
- March: Workforce Research & Planning
- Ongoing: Advocacy!

\*





**THANK  
YOU**