



West Central Region 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

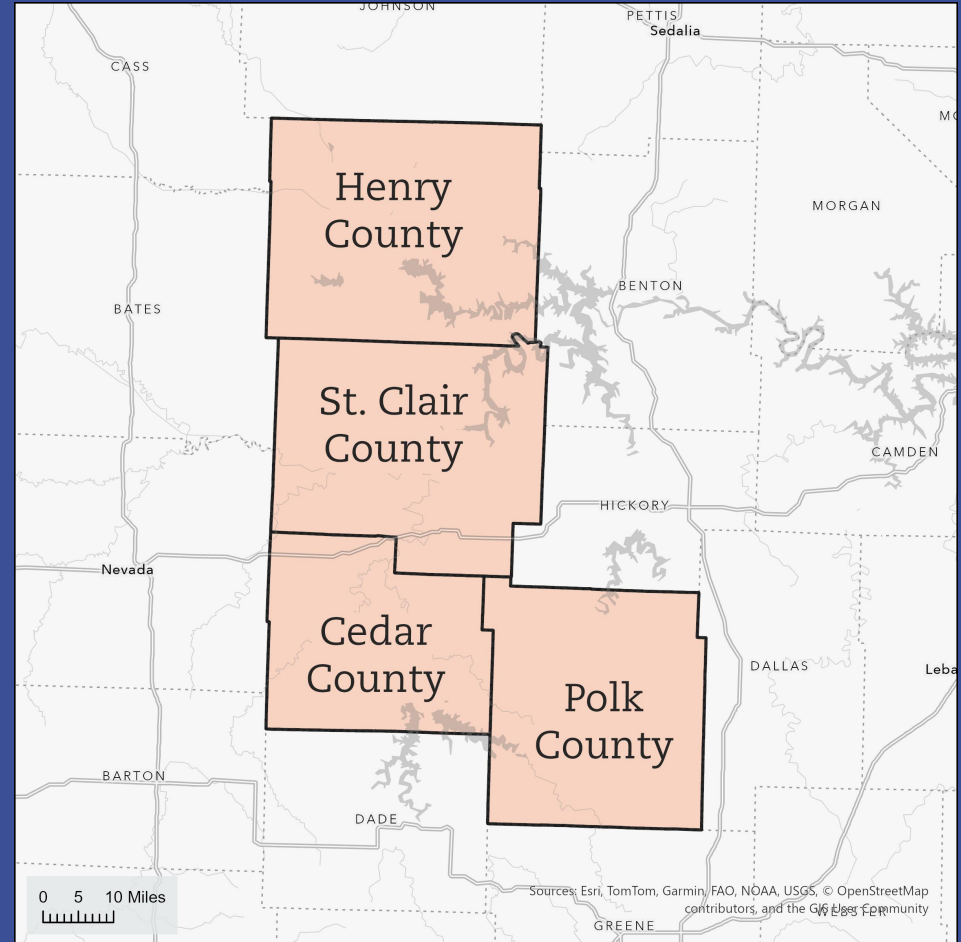
Meeting #2
07.24.25

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

Study Area

West Central Region

Henry County
St. Clair County
Cedar County
Polk 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
 - o Child Care Aware list of regulated 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:

- Across the region, there are slots available for 28% of Infants and Toddlers.
- Preschool (ages 3-5) and Pre-K (ages 4-5) capacity varies by county. St. Clair being the only county with a surplus of both.

- Expand Access to Income-based Programs:

- Four out of every 10 kids eligible for Early Head Start and Head Start have seats in those classrooms. Adding ~180 seats to each program would meet the needs of the region.
- A few families are successfully accessing the state subsidy program. More than 1,000 additional kids are eligible for the subsidy based on income.



Supply: ECE regulated 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



Regulated Provider Information

	NUMBER OF HOME-BASED PROVIDERS	NUMBER OF CENTER-BASED PROVIDERS	NUMBER OF GROUP HOME PROVIDERS	NUMBER OF ACCREDITED PROVIDERS
Cedar	1	5	1	0
Henry	5	1	1	2
Polk	1	10	0	1
St. Clair	1	1	0	0
WEST CENTRAL	8	17	2	3

This table does not include Pre-K programs



Regulated provider capacity - Infants and Toddlers (ages 0-2)

	NUMBER OF SLOTS, TOTAL	NUMBER OF EARLY HEAD START SLOTS	NUMBER OF STATE SUBSIDY SLOTS	NUMBER OF ACCREDITED SLOTS
Cedar	68	40	3	0
Henry	162	44	31	72
Polk	201	16	32	13
St. Clair	39	20	0	0
WEST CENTRAL	470	120	66	85



Regulated provider capacity - Preschool (ages 3-5)

	NUMBER OF SLOTS, TOTAL	NUMBER OF HEAD START SLOTS	NUMBER OF STATE SUBSIDY SLOTS	NUMBER OF ACCREDITED SLOTS
Cedar	247	70	9	0
Henry	575	50	69	80
Polk	795	15	71	15
St. Clair	199	0	2	0
WEST CENTRAL	1,816	135	151	95

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 - Infants and Toddlers (ages 0-2)

	NUMBER OF KIDS WHO NEED CARE	NUMBER OF KIDS IN POVERTY ELIGIBLE FOR EARLY HEAD START	NUMBER OF KIDS ELIGIBLE FOR STATE SUBSIDY
Cedar	302	72	181
Henry	478	75	134
Polk	748	138	273
St. Clair	162	14	58
WEST CENTRAL	1,691	299	646

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



Family need - Preschool (ages 3-5)

	NUMBER OF KIDS WHO NEED CARE	NUMBER OF KIDS IN POVERTY ELIGIBLE FOR HEAD START	NUMBER OF KIDS ELIGIBLE FOR STATE SUBSIDY
Cedar	312	76	190
Henry	494	80	142
Polk	788	147	289
St. Clair	177	16	64
WEST CENTRAL	1,771	319	685

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



Gap in total regulated slots - Infants and Toddlers

	NUMBER OF SLOTS, TOTAL	NUMBER OF KIDS WHO NEED CARE	GAP IN SLOTS, TOTAL	PERCENT SERVED
Cedar	68	302	-235	22%
Henry	162	478	-316	34%
Polk	201	748	-547	27%
St. Clair	39	162	-123	24%
WEST CENTRAL	470	1,690	-1,220	28%

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



Gap in total regulated slots - Preschool incl. Pre-K

	NUMBER OF PRESCHOOL SLOTS	NUMBER OF KIDS WHO NEED CARE	GAP IN SLOTS, TOTAL	PERCENT SERVED
Cedar	247	312	-65	79%
Henry	575	494	81	116%
Polk	795	788	7	101%
St. Clair	199	177	22	112%
WEST CENTRAL	1,816	1,771	45	103%

This table is based on the assumption that 70% of kids need care.
 Preschool (age 3-5 years) includes Pre-K programs



Gap in total regulated slots - Pre-K only

	NUMBER OF PRE-K SLOTS	NUMBER OF KIDS WHO NEED CARE	GAP IN SLOTS, TOTAL	PERCENT SERVED
Cedar	88	102	-14	87%
Henry	140	167	-27	84%
Polk	255	264	-9	96%
St. Clair	139	58	81	241%
WEST CENTRAL	622	591	31	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 Early Head Start slots

	NUMBER OF EHS SLOTS	NUMBER OF ELIGIBLE KIDS	GAP IN SLOTS, TOTAL	PERCENT SERVED
Cedar	40	72	-32	55%
Henry	44	75	-31	59%
Polk	16	138	-122	12%
St. Clair	20	14	6	141%
WEST CENTRAL	120	299	-179	40%

EHS eligibility=100%FPL. This table is based on the assumption that 70% of kids need care. EHS is for children under the age of 3.



Gap in Head Start slots

	NUMBER OF HS SLOTS	NUMBER OF ELIGIBLE KIDS	GAP IN SLOTS, TOTAL	PERCENT SERVED
Cedar	70	76	-6	92%
Henry	50	80	-30	62%
Polk	15	147	-132	10%
St. Clair	0	16	-16	0%
WEST CENTRAL	135	319	-184	42%

HS eligibility=100%FPL. This table is based on the assumption that 70% of kids need care.
HS serves children between the ages of 3 to 5 years.



Gap in State Subsidy access - Infants and Toddlers

	NUMBER OF STATE SUBSIDY SLOTS	NUMBER OF ELIGIBLE KIDS	GAP IN SLOTS, TOTAL	PERCENT SERVED
Cedar	3	181	-178	2%
Henry	31	134	-103	23%
Polk	32	273	-240	12%
St. Clair	0	58	-58	0%
WEST CENTRAL	66	646	-580	10%

Eligibility=at or below 150% FPL. This table is based on the assumption that 70% of kids need care



Gap in State Subsidy access - Preschool

	NUMBER OF STATE SUBSIDY SLOTS	NUMBER OF ELIGIBLE KIDS	GAP IN SLOTS, TOTAL	PERCENT SERVED
Cedar	9	190	-181	5%
Henry	69	142	-73	49%
Polk	71	289	-218	25%
St. Clair	2	64	-62	3%
WEST CENTRAL	151	685	-534	22%

Eligibility=at or below 150% FPL.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)



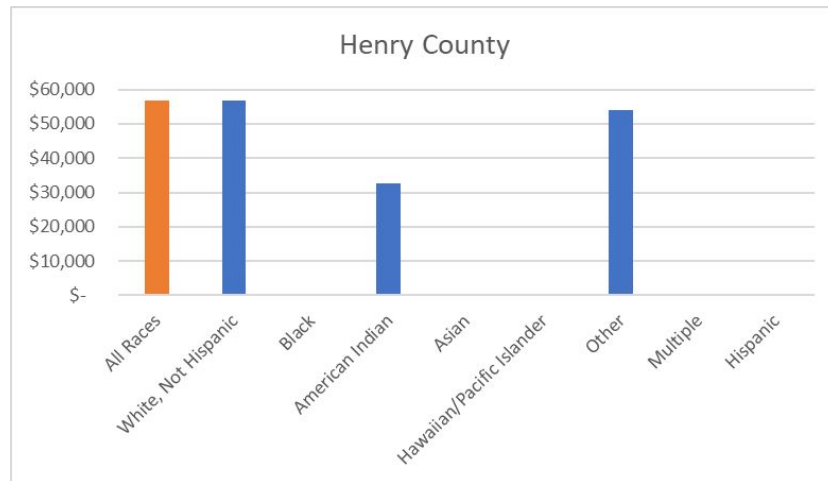
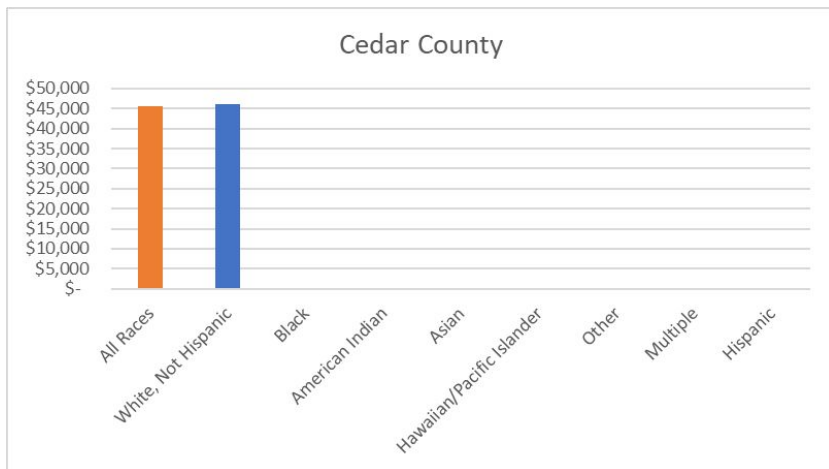
Household characteristics

	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
Cedar	\$39,412	\$45,577	16%	1,013	1,073	6%	730	527	-28%
Henry	\$43,911	\$56,621	29%	1,318	1,438	9%	758	1,090	44%
Polk	\$44,892	\$56,686	26%	2,115	2,309	9%	1,301	1,364	5%
St. Clair	\$38,470	\$46,731	21%	547	545	0%	447	349	-22%



Median Household Income, 2023 by race or ethnicity

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

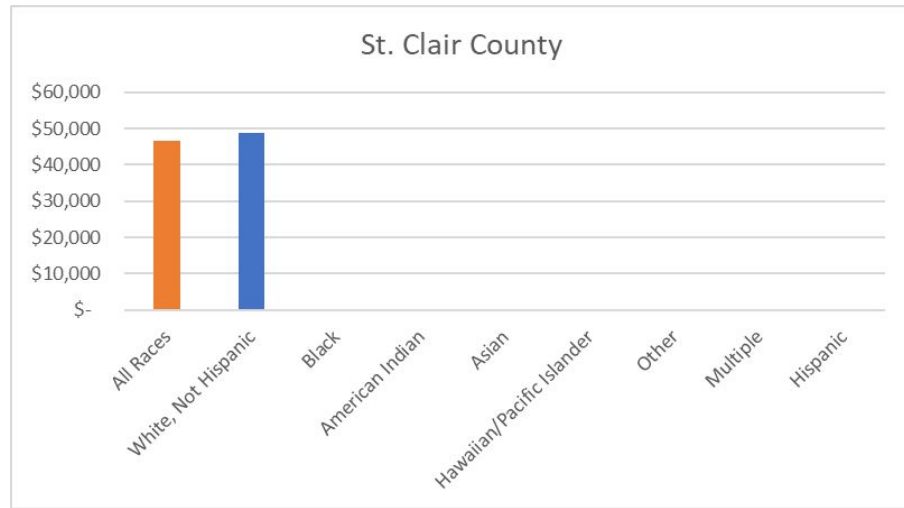
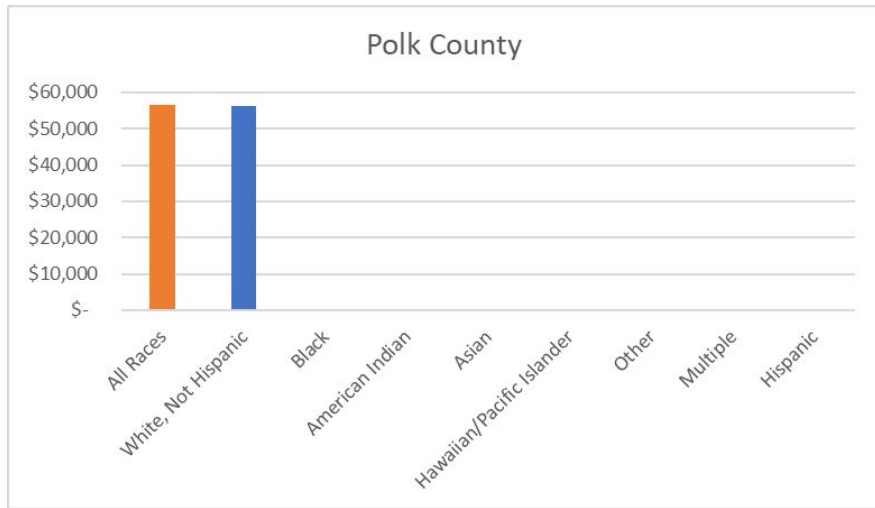


Some values are not reported due to insufficient sample size or high margins of error.



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
Cedar	13,938	14,440	4%	13,204	13,375	1%	734	1,065	45%
Henry	21,765	22,194	2%	20,387	20,405	0%	1,378	1,789	30%
Polk	31,549	32,109	2%	29,594	29,591	0%	1,955	2,518	29%
St. Clair	9,383	9,451	1%	8,864	8,782	-1%	519	669	29%



Study area workers - Cedar County

Live and work in Cedar County	1,555	49.5%
Work in Greene County and live in Cedar County	720	13.3%
Work in Polk County and live in Cedar County	474	8.7%
Work in Vernon County and live in Cedar County	342	6.3%
Live in Vernon County and work in Cedar County	331	10.5%
Live in Polk County and work in Cedar County	201	6.4%

About 1,500 residents leave Cedar County for work, while about 500 commuters travel to the county for work.



Study area workers - Henry County

Live and work in Henry County	3,976	49.3%
Work in Cass County and live in Henry County	524	5.9%
Work in Johnson County and live in Henry County	481	5.4%
Live in Johnson County and work in Henry County	545	6.8%
Live in St. Clair County and work in Henry County	441	5.5%
Live in Benton County and work in Henry County	415	5.1%
Live in Jackson County and work in Henry County	401	5.0%

Almost twice as many workers commute in to Henry County jobs than the number of residents who commute out.



Study area workers - Polk County

Live and work in Polk County	4,778	49.6%
Work in Greene County and Live in Polk County	3,894	28.5%
Live in Greene County and Work in Polk County	1,134	11.8%

- About half of Polk County workers live and work within the county.
- More than twice as many residents commute out of the county for work than the number of workers that commute in from nearby counties.



Study area workers - St. Clair County

Live and work in St. Clair County	737	47.2%
Work in Henry County and live in St. Clair County	441	13.0%
Work in Greene County and live in St. Clair County	270	7.9%
Work in Jackson County and live in St. Clair County	201	5.9%
Work in Polk County and live in St. Clair County	196	5.8%
Live in Henry County and work in St. Clair County	113	7.2%
Live in Bates County and work in St. Clair County	98	6.3%

More than 1,000 St. Clair County residents leave the county for work, compared to the ~200 who commute into the county.



Top employers - Cedar County

Employer	Sector	Employees
El Dorado Springs R-II School	Educational Services	188
Woods Supermarket	Retail Trade	164
Dairy Farmers of America	Dairy Products-Wholesale	130
Lake Stockton Healthcare Facility	Skilled Nursing Care Facilities	123
Woods Supermarket	Retail Trade	119
Stockton High School	Educational Services	110
Cedar County Memorial Hospital	Health Care and Social Assistance	108
Hammons Products Company	Retail Trade	100
Superior Gearbox	Manufacturing	55
Sac-Osage Electric Coop.	Electric and Other Services	38

Source: Cedar County, El Dorado Springs Chamber of Commerce and Esri Business Analyst



Top employers - Henry County

Employer	Sector	Employees
Golden Valley Memorial Healthcare	Healthcare Provider	889
Compass Health Network	Mental Health Provider	644
White River Marine	Boat Manufacturer	256
Walmart	Retailer	248
Clinton MO School District	Public Schools K-12	245
Schreiber	Cheese Manufacturer	217
Transcontinental Packaging	Flexible Packaging Manufacturer	237
Champion Brands/PLZ	Speciality Lubricants and Additives	115
Henry County Government	County Government	90
City of Clinton Government	City Government	70

Source: Henry County, Clinton Chamber of Commerce.



Top employers - Polk County

Employer	Sector	Employees
Citizens Memorial Hospital	Health Care & Social Assistance	2,250*
Walmart Supercenter	Retail Trade incl. Grocery	360
Bolivar R-1 Schools	Educational Services	340
Southwest Baptist University	Educational Services	320
Tracker/White River Marine	Manufacturing	285
Duck Creek Technologies	Software	250*
Flora Farms	Cannabis Dispensary	200
Best Beef (formerly Missouri Prime Beef)	Agriculture and Food Products	200
Woods Supermarket	Retail Trade - Grocery	183
City of Bolivar	City Government	101
Polk County	County Government	88
Southwest Electric Cooperatives Inc.	Utility	78

**Some employees are based at other locations*

Source: Polk County, The Economic Development Partnership and Esri Business Analyst.



Top employers - St. Clair County

Employer	Sector	Employees
H Roe Bartle Scout Reservation	Outdoor Recreation	300 (seasonal)
West Central Missouri Community Action Agency	Nonprofit Social Services	91
UPS Customer Center	Professional, Scientific & Tech Services	78
Ellett Memorial Hospital	Health Care & Social Assistance	75
Osceola Board of Education	Educational Services	70
St. Clair County Sheriff	Public Administration	70
Truman Lake Manor, Inc.	Skilled Nursing Care	70
Appleton City R-II School District	Educational Services	56
Roscoe Elementary School District	Educational Services	52
Appleton City Manor, LLC	Senior Residence and Skilled Nursing Care	50

Source: St. Clair County, Esri Business Analyst.



SURVEY INSIGHTS

Research Scope

This report focuses on qualitative community survey research of parents and employers based or working in the four counties of the West Central Region.

**Parents of children ages 5 and under
(n=169 surveyed, Cedar = 12, Henry =
67, Polk = 62, St. Clair = 28):**

- 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=27):**

- 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=13)**

- KidsWin/IFF Surveys April-June 2025, covering Henry, Cedar, St. Clair, and Polk.

Key Takeaways

1

Access is elusive and inequitable.

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

Parents are often forced to sacrifice quality of services to meet childcare needs.

2

Enrolling has many costs.

Landing a seat - success - comes with many costs: parents often have to rely on family members and other social networks to bundle care due to standard daycare hours and often do so with larger commute times.

3

Providers struggle with staff and the state.

Providers have many issues related to the cost of staffing - they feel that they simply can't pay what's necessary to succeed.

Regulatory challenges are also a frequent complaint.

4

A universal challenge for employers.

Costs are recognized as by nearly all responding employers, especially by employers with 24/7 schedules or shift work.

**Who are the
Parents?**

Demographics of Respondents

Income Level	% of respondents
\$20,000 or less	2%
\$20,001 to \$40,000	15%
\$40,001 to \$60,000	15%
\$60,001 to \$80,000	14%
\$80,001 to \$100,000	27%
\$100,001 to \$150,000	19%
\$150,000 to \$200,000	5%
\$200,001 to \$250,000	1%
\$250,001 or more	2%



Survey median is above the range of the average of the county medians: \$51k

**average of the medians for the four counties*

Demographics of Respondents

Race/Ethnicity	% of respondents
American Indian and Alaska Native	0%
Asian	0%
Black or African American	0%
Hispanic or Latino	2%
Multiracial or Biracial	3%
Native Hawaiian and Other Pacific Islander	0%
White	95%

Largely in-line with the demographics of the 4 counties.



**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 who does not have a waiting list for enrollment	73%
It is easy to find a provider who is affordable	70%
It is easy to find a provider whose availability fits my schedule	53%
It is easy to find a provider who is conveniently located for my family	48%
It is easy to find the a provider who meets my quality standards	46%
It is easy to find the right provider with a program or approach that meets my specific needs (for example, equipped to meet my child's special needs, speak my preferred language, match my preferred teaching style, etc.)	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 make sacrifices due to affordability and access.

I have given up quality of care just to be able to find something affordable and conveniently located for my job.

- **St. Clair County Parent**

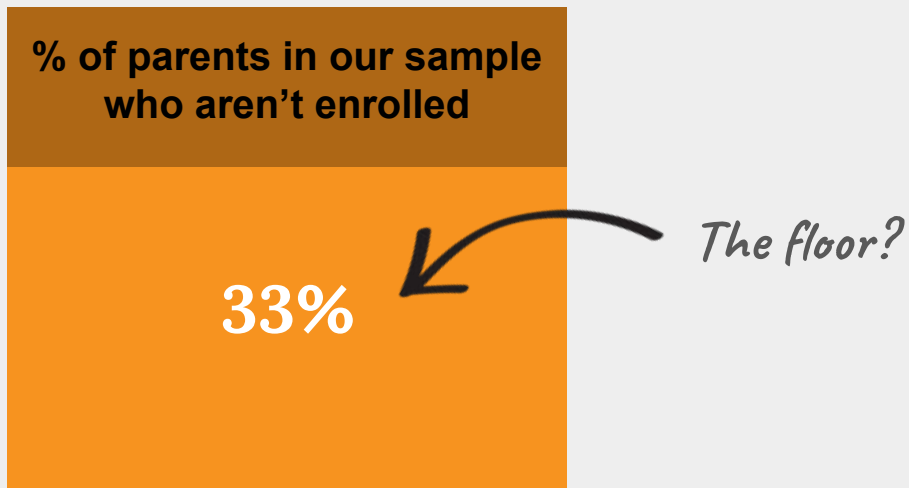
Cutting back hours at work in order to drop off in the mornings. As well as leaving early to pick up, resulting in shorter hours at my job. We also moved from out of town to in town in order to be able to accommodate childcare.

- **Henry County Parent**

Quality of service provided. My child does not get any educational opportunities at their providers home due to the number of kids they care for...

- **St. Clair 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**

33%

“
There are very few options for licensed facilities in my area and they seem to be full often. It is also very very expensive almost to the point that staying home would be cheaper. I also don't want to pay for days my child won't be there.

- **Henry County Parent**

“
I have not found a daycare that I can afford to put both children in, yet I do not qualify for State assistance.

- **Polk 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**

54%

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**

54%

“

My first child was on a wait list for 10 months and only received half a day of care which affected my work. The second child, I've been reminding the school yearly since his birth about wanting full day care.

- **Henry County Parent**

“

As soon as we found out we were expecting, we spoke to all daycare facilities in town. Each time, our expected child was placed on a waitlist and we had to stress about if we would have daycare or not.

- **Cedar 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 reported paying when asked how much they spend monthly per child on care.



\$555

Infant/Baby
(0-2)



\$550

Twos
(2-3)



\$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.

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



We have a very strict budget with little wiggle room...When [our] daycare is closed, we spend more money because we either have to pay someone else (in addition to paying our daycare provider despite the fact that she is not open) or we have to spend money in gas to drive our children to stay with a grandparent-this results in 3 hours of travel, a late night for us, and a second trip to go back to pick them up.

-- Polk 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? 11%

Left work earlier than normal	67%
Missed one or more full shifts of work	63%
Been late for work	58%
Distracted to the point of being unproductive	29%

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?

Compensation & Hours	Changed work schedule	54%
	Reduced total working hours	38%
	Reduced pay	25%
	Started to work-from-home without changing employers	6%
Career Development	Took a new job solely to accommodate care	34%
	Turned down a new job offer or promotion	31%
	Turned down or stopped pursuing further education	29%
	Demoted	2%
Separations	Quit a job	25%
	Been let go or fired	4%

None of the Above? 18%

Other? 5%

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?

Other? 7%

Experienced harm to the health or happiness of important relationships	26%
Experienced harm to mental health	21%
Moved in with relatives, or had relatives move into your home	15%
Moved to a new home	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.

“

There have been a lot of sacrifices made while dealing with childcare issues, but the hardest part would have to be having to rely so much on family. Having to ask people to watch my kids last minute, ask for people to pick my kids up, etc. We have had to have a lot of help from others so that we were able to still work.

-- Henry County Parent

”

**Employers:
what is their
experience?**

Childcare is a recognized challenge, and almost all 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	23%
Significantly - employees' access to child care causes moderate challenges for my business	23%
Somewhat - employees' access to child care causes some challenges for my business	27%
Slightly - employees' access to child care causes minor challenges for my business	23%
Not at all - employees' access to child care does not cause challenges for my business	4%

46% are in the top two boxes.

Only 4% don't recognize the issue.

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
Your ability to set schedules	38%
Your ability to operate at full capacity	35%
Your ability to hire staff	42%
Your ability to retain employees	38%

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	81%
Employees trading shifts with co-workers, or otherwise temporarily changing their work hours / availability	56%
Employees permanently changing their work hours / availability	52%
Candidates declining employment offers	44%
Employees terminating their employment	41%
Other	4%
None of the above	7%

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

We have some staff who did not manage their child's daily care responsibly. Meaning, their childcare needs vary from day to day. They often do not have a backup plan. Childcare is expensive, so many times childcare for them is based on the availability of a family member or friend.

- **Owner Healthcare Services**

Our shifts run from 6pm-6am and 6pm-6am. For those working nights, there is no overnight care available. For those working days, they would not be able to pick a child up until 6:30pm. Facilities are closed by then.

- **HR Manager in Warehousing**

We have had to have employees bring in kids or grandkids that are in their care when they need to work because they either don't have childcare or cant afford it.

- **Operations Coordinator in Services**

**Providers:
what is their
experience?**

Challenges are numerous and diverse, but cost of staffing looms large..

“My biggest challenge is hiring quality candidates and paying them. Our staff was started at \$14/hour before minimum wage went up, which was enticing. Now I have to raise rates to pay staff \$15/hour, which will be minimum wage soon, which is not enticing. I'm not able to offer \$16 or \$17/hour to attract the right candidates with the experience I am looking for.”

“Dealing with state! They have no clue how an actual day to day facility needs to operate. The childcare subsidy is the worst! No one can answer your questions, [its'] a pain to get payments and no communication. They all have different rules that interfere with each other.”

“We operate at a \$10,000 deficit yearly.”

“Paying more for the teachers. We under pay our staff.”

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.

Not enough applicants for open positions	36%
--	------------

Applicants are unqualified for the work	29%
---	------------

Applicants do not accept offers	7%
---------------------------------	-----------

Other	14%
-------	------------

None of the above	21%
-------------------	------------

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	36%
Staff having to be let go due to performance issues	36%
Staff leaving to care for their own children or family members	14%
Staff leaving to retire	7%
Other	21%
None of the above	29%

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. **The biggest barriers are long waitlists and high prices.**

Parents are often forced to sacrifice quality of services to meet childcare needs.

2

Enrolling has many costs.

Landing a seat - success - comes with many costs: parents often have to rely on family members and other social networks to bundle care due to standard daycare hours and often do so with larger commute times.

3

Providers struggle with staff and the state.

Providers have many issues related to the cost of staffing - they feel that they simply can't pay what's necessary to succeed.

Regulatory challenges are also a frequent complaint.

4

A universal challenge for employers.

Costs are recognized as by nearly all responding employers, especially by employers with 24/7 schedules or shift work.

FISCAL MAP & COST MODELS

Tuition data

median household income (MHI)

\$51,404

% annual income parents pay for infant & toddler care

27%
(\$14,040*/year)

% annual income parents pay for preschool care

20%
(\$10,400*/year)

affordable cost level (7% MHI)

\$3,837

weekly tuition rates* by county

Cedar/Henry/St Clair
 Infant-toddler: \$265/week
 Preschool: \$200/week

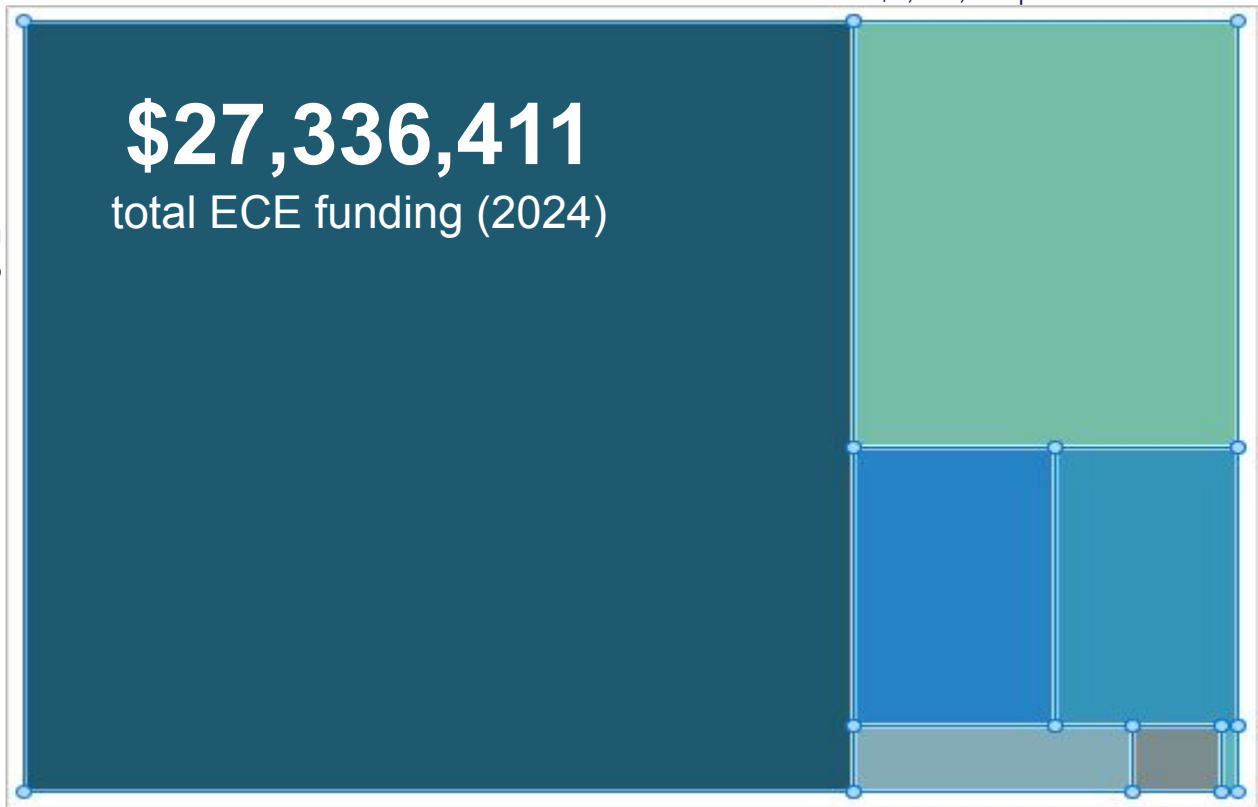
Polk
 Infant-toddler: \$275/week
 Preschool: \$200/week

average tuition across all 4 counties

IT: \$270/week → \$14,040/yr
PS: \$200/wk → \$10,400/yr

*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.





Parent tuition
\$19,899,360 | 73%

\$27,336,411
total ECE funding (2024)

District PreK
\$4,106,187 | 15%

CACFP
\$1,424,144 | 5%

Child care subsidy*
\$1,274,377 | 4%

EHS/HS
\$458,113 | 2%

District ECSE
\$146,397 | 1%

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



Reflections on the map, fiscally speaking

How balanced is the map?

- **Parents carry the heaviest burden**
 - **Parent tuition** makes up a **LARGE %** of each county's **ECE \$\$ ecosystem**
 - Cedar: 33%
 - **Henry: 58%**
 - **Polk: 71%**
 - **St Clair: 49%**
- **Underutilized child care subsidy** (\$650k and below/less than 10%)
 - Cedar: 1%
 - Henry: 8%
 - Polk: 5%
 - St Clair: 0%

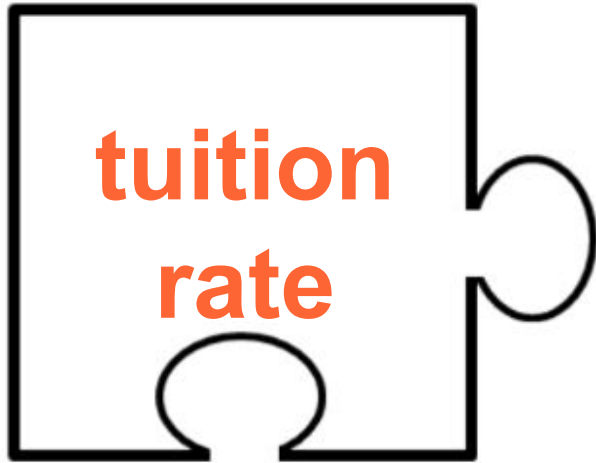
Philanthropy (2024)

Total flowing into your community: **\$15,284,163**

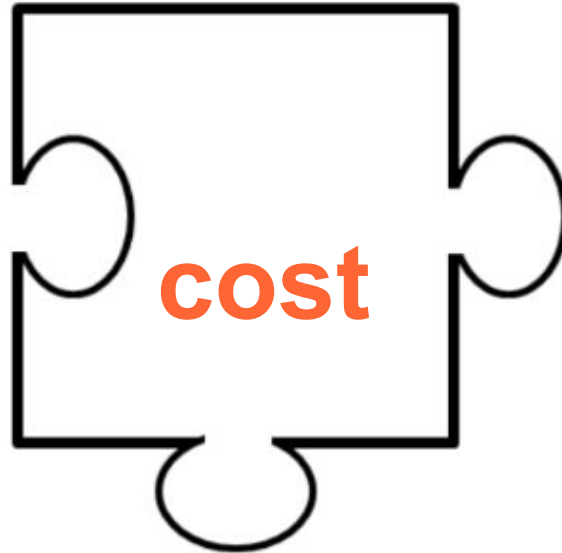
Total spent on ECE specific programs: **\$27,833**



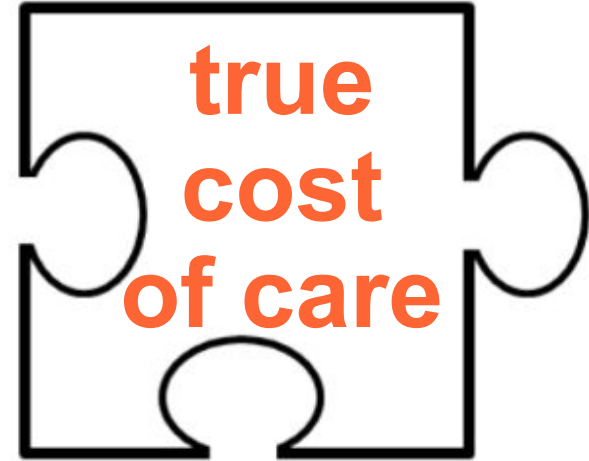
Why cost models?



what the local market can bear



actual expenses to operate a program



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

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

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^(def):

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

-balancing quality care with profit margins is crucial for sustainability

	TUITION RATE (Current provider rate)	COST (Baseline)	TRUE COST OF CARE ("PLUS")
Tuition			
Infant/toddler (0-2 years)	\$14,040	\$17,426	\$21,728
Preschool (3-5 years)	\$10,400	\$10,766	\$12,717
Net revenue			
			-\$298,192

Nonprofit faith-based program, mid-sized

76 total children
16: IT
60: Preschool

Nonprofit program^(def):

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

-tax exempt

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

	TUITION RATE (Current provider rate)	COST (Baseline)	TRUE COST OF CARE ("PLUS")
Tuition			
Infant/toddler (0-2 years)	\$14,040	\$16,564	\$21,251
Preschool (3-5 years)	\$10,400	\$10,143	\$12,241
Net revenue			
			-\$336,850*

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

Family child care program, regulated

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.

	TUITION RATE (Current provider rate)	COST (Baseline)	TRUE COST OF CARE ("PLUS")
Tuition			
Infant/toddler (0-2 years)	\$14,040		
Preschool (3-5 years)	\$10,400		
Cost per child		\$6,922	\$8,871
Net revenue			
		\$34,079	\$14,583

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?



What's Next?

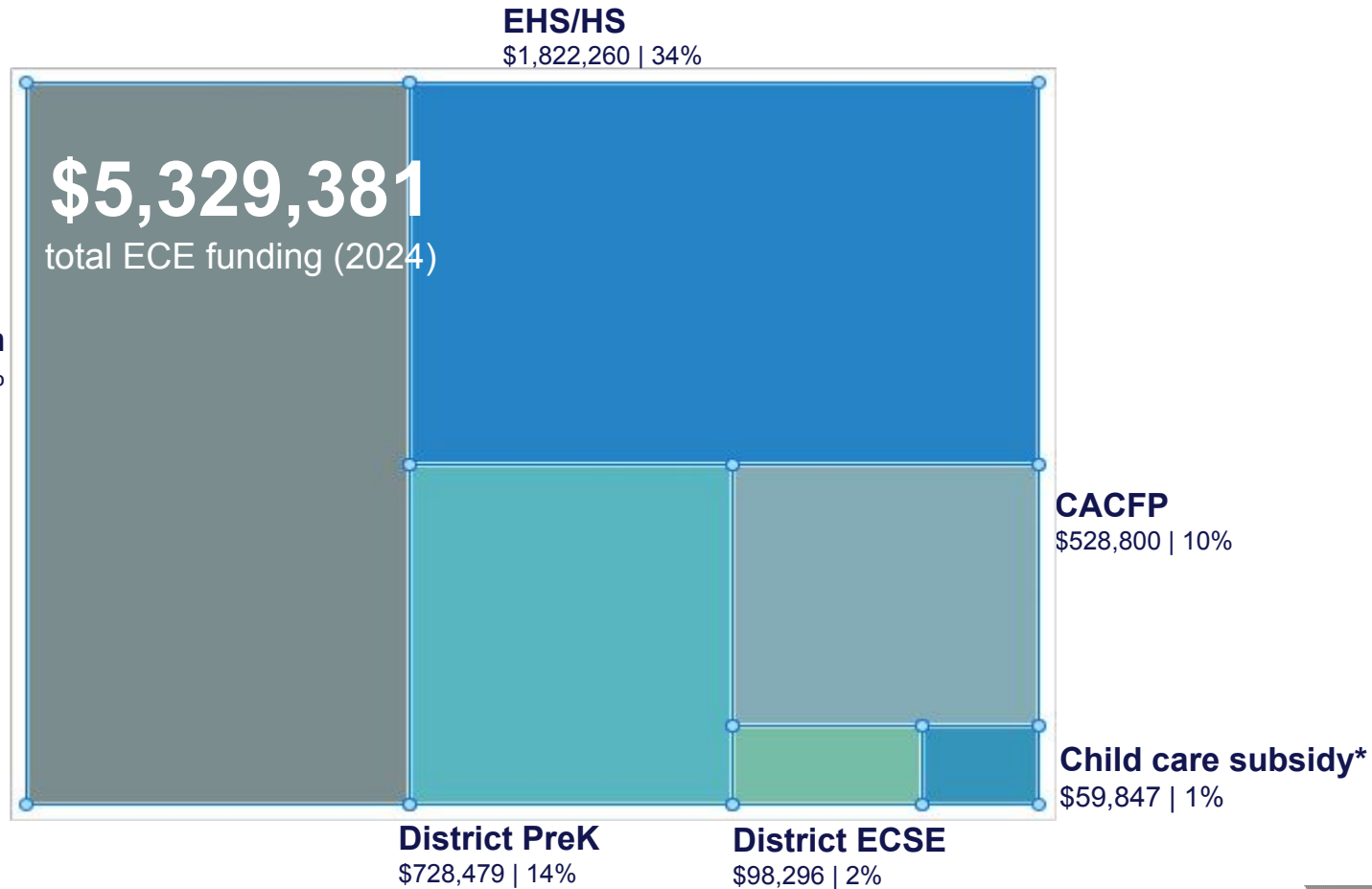
Solution-Building Work Session:
SEPTEMBER 24

We will meet in person 1:00 to 4:00 p.m. in Clinton.

At this meeting, we will explore solutions and develop strategies.



ADDENDUM

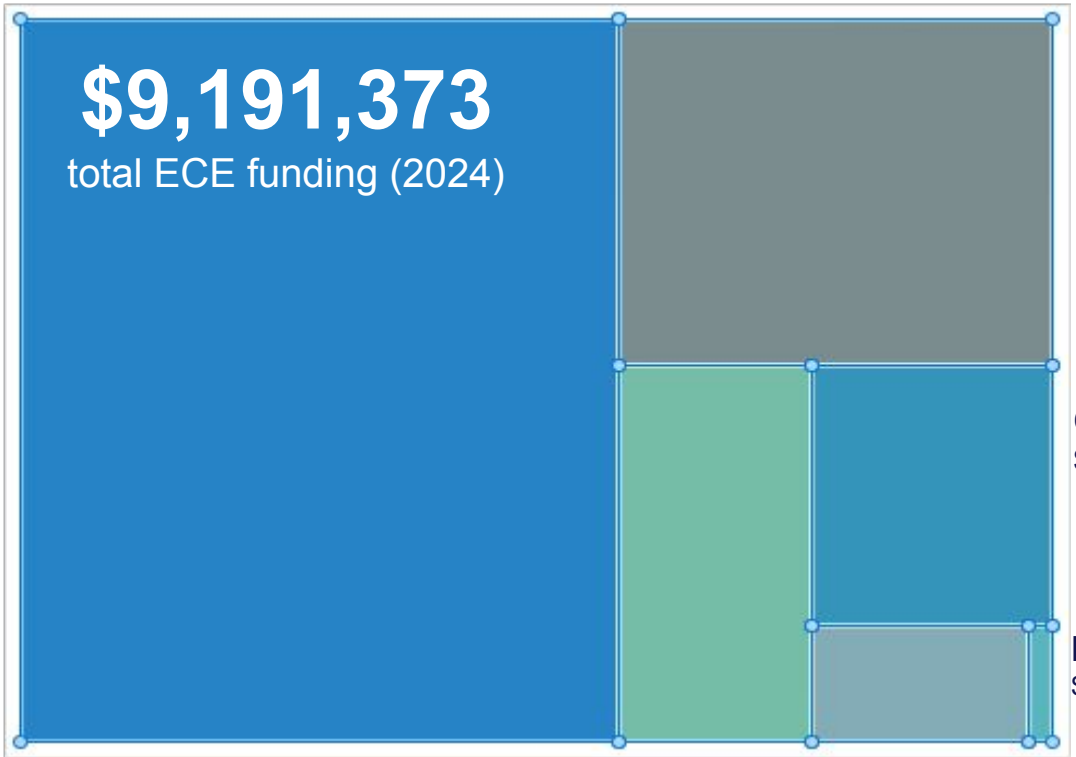


*Subsidy data last available Jan 2023-Dec 2023 via MO DSS Child Care Monthly Management Reports



EHS/HS
\$1,557,204 | 17%

Parent tuition
\$5,941,260 | 65%



District PreK
\$756,121 | 8%

CACFP
\$258,850 | 3%

Child care subsidy*
\$650,105 | 7%

Philanthropy
\$27,833 | 0%

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



Parent tuition
\$9,561,500 | 74%

\$12,864,487
total ECE funding (2024)

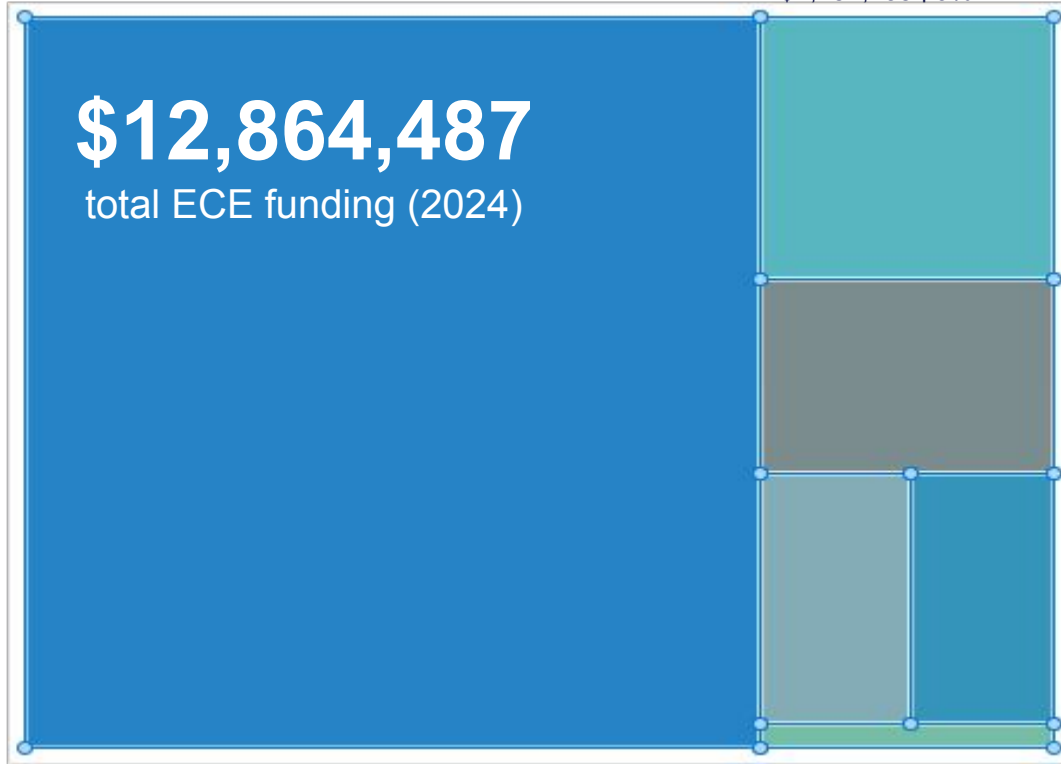
District PreK
\$1,187,235 | 9%

EHS/HS
\$872,329 | 7%

CACFP
\$583,604 | 5%

Child care subsidy*
\$552,587 | 4%

District ECSE
\$107,232 | 1%



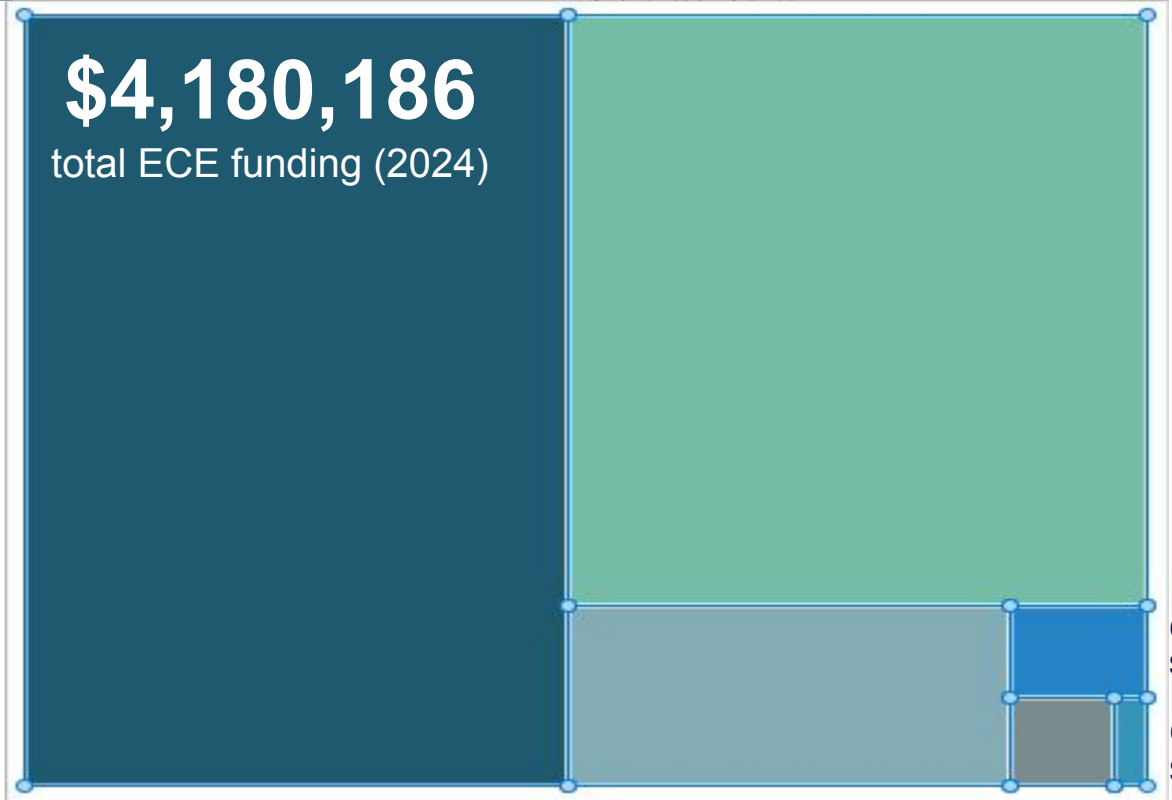
*Subsidy data last available Jan 2023-Dec 2023
via MO DSS Child Care Monthly Management Reports



District PreK
\$1,434,352 | 34%

Parent tuition
\$2,310,620 | 55%

\$4,180,186
total ECE funding (2024)



EHS/HS
\$331,320 | 8%

District ECSE
\$39,165 | 1%

CACFP
\$52,891 | 1.5%

Child care subsidy*
\$11,838 | 0.5%

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



Federal Poverty Level (FPL)

What is the FPL?

It is a measure of income updated yearly by the Department of Health and Human Services (HHS) that's used to determine eligibility for certain programs and benefits, such as Head Start, SNAP, Medicaid and the Childrens Health Insurance Program (CHIP).

Click below to see the full
2025 Federal Poverty Level Guidelines



[Federal Poverty Level \(FPL\) Guidelines 2025](#)

2025 FPL Values (100%)		
Number of Individuals in your Household	Annual Income Limit	Monthly Income Limit
1	\$15,650	\$1,304
2	\$21,150	\$1,763
3	\$26,650	\$2,221
4	\$32,150	\$2,679
5	\$37,650	\$3,138
6	\$43,150	\$3,596
7	\$48,650	\$4,054
8	\$54,150	\$4,513
9	\$59,650	\$4,971
10	\$65,150	\$5,429
Additional amount added per household member	\$5,500	\$458



Data sources

STAKEHOLDER SURVEYS

- **What:** online survey instruments
- **Who** (audience): parents, child care directors/owners, and HR staff at employers in the community
- **How:** West Central Region ECE Community Planning Team distributed and collected surveys from all three stakeholders across the West Central Region utilizing their networks
- **Data source (slides 35-63):** all data is reported directly from the above collected stakeholders in the surveys
 - Parents of children ages 5 and under: n=169
 - Employers: n=27
 - ECE directors/owners: n=13

DATA FOR FISCAL MAPS & COST MODELS

- **Tuition data**
 - **Source** (slides 65-72): Office of Childhood 2024 Market Rate Survey
 - Child care directors/owners complete this survey that is administered by a consultant working with the Office of Childhood. The Market Rate Survey asks program directors/owners questions regarding: capacity, staffing, hours, funding sources, tuition rates, and more.
- **Subsidy data**
 - Source: Office of Childhood Subsidy Data
 - Subsidy rate data is utilized to create localized, representative cost models.



agenda

1. Welcome
2. Key Findings/Priorities
3. Strategy Brainstorm
4. Review of Existing Strategies
5. Ranking
6. Next steps

COMMUNITY TEAM

Meeting #3
09.24.25

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

Priority Review

West Central Region

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

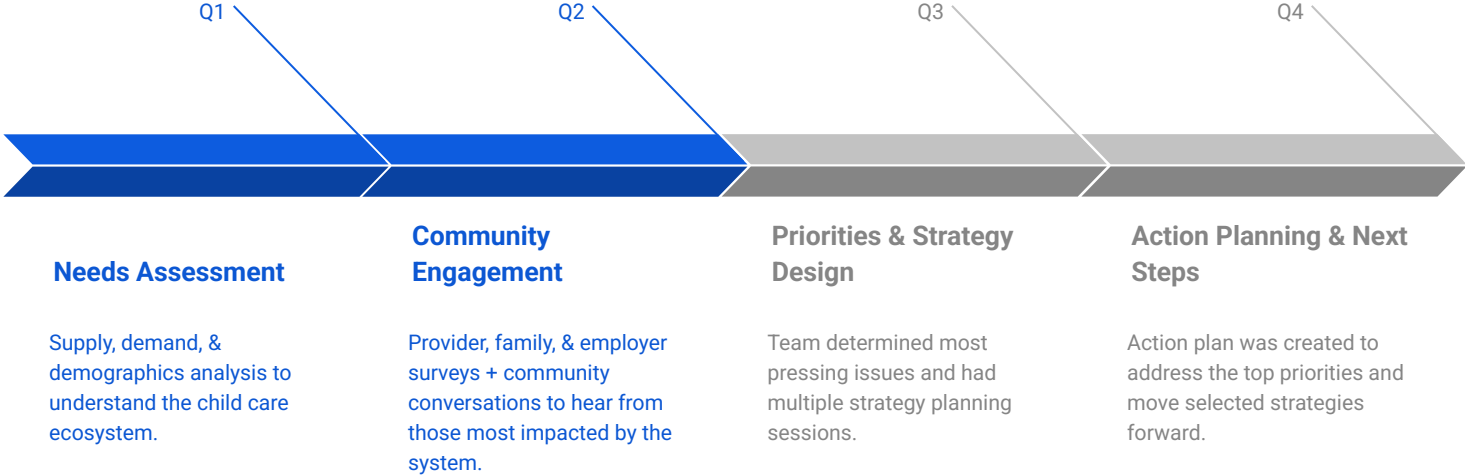
1. Welcome
2. Year in Review
3. Strategy Overview
4. Next steps

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

West Central Region

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

West Central Region

1. Child Care Works: Community of Practice*
2. Shared Services Approach*
3. Family Child Care Champions*
4. Revenue Research*
5. Ongoing ECE Advocacy
6. Child Child Workforce Pipeline
7. Family Navigation

*Initial funding secured



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

Family Child Care Champions

- The goal is to recruit up to 4 new family child care home providers and support them through the licensing process.
 - 1 on 1 technical assistance, mini-grant facility funds, quarterly webinars, and mentorship support
- New Growth will support recruitment & learn the process.
- Kick-off is Spring 2026



Strategy Overview

Shared Services Approach

- New Growth will develop an approach to support child care providers across the region.
 - First plan to focus on trust-building and cost-saving resources, eventually looking to provide business assistance and technical support. In the future, they could establish shared back-office staff and administrative functions.
- At first it will be focused on Family Child Care providers.
- Planning kicks-off is Spring 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.
- Kids Win is also working with New Growth to research economic development funding mechanisms.
- 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



Strategy Overview

Child Care Workforce Pipeline (including sub pool)

- Activities would focus on convening key stakeholders to understand what resources, programs, partnerships, etc. currently exist in this space.
- The process would align with Office of Childhood activities and resources.
- A local approach would be designed based on what is discovered.
- Additional planning and funding to support this strategy would be needed.



Strategy Overview

Family Navigation

- This strategy would be focused on helping families access child care subsidy and ensure real-time information about slot availability.
- Two phases:
 1. Resource mapping/community engagement
 2. Strategy design based on findings
- Additional planning and funding to support this strategy would be needed.



Next Steps

- January 2026: CCW COP & Revenue Research
- Spring 2026: SSA development begins & Family Child Care Champions
- Ongoing: Advocacy!
- TBD: Child Care Workforce Pipeline & Family Navigation Support





**THANK
YOU**