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UNDERSTANDING BARRIERS TO PROVIDING HIGH-QUALITY CHILD CARE IN TARRANT COUNTY, TEXAS

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EXECUTIVE SUMMARY

2022 IS A CRITICAL MOMENT for the child care system in Tarrant County. The system faces multiple long-standing challenges that have been worsened by the COVID-19 pandemic, including low wages, high staff turnover, and the increasing cost of care. These challenges have already forced many child care businesses to permanently close their doors. In turn, this has further reduced the county's already limited supply of child care spots just as many parents look to re-enter the workforce. There are also signs of hope. To confront these challenges, local leaders recently announced a historic \$45 million investment to support child care in the county.¹ Child care business owners in the county have successfully organized to reform local regulations that were unnecessarily restricting their operations. At this critical time, local leaders, including elected officials, philanthropies, non-profits, and other advocates, have the opportunity to reaffirm their support for Tarrant County's child care businesses. Missing this window for action risks not only the future of Tarrant County's children and families but could also forfeit the hard-fought gains and progress made by local child care providers and advocates. By acting now, local leaders have the opportunity to work alongside child care providers to create a more just and sustainable child care economy that meets the needs of children, parents, and providers.

THE SITUATION IN TARRANT COUNTY

- + **INADEQUATE SUPPLY OF CHILD CARE** – There are significantly more children in need of child care in Tarrant County than available spots.
- + **EVEN FEWER PROVIDERS AFTER COVID** – The frequent temporary closures and associated business losses during COVID forced many providers to permanently close, further reducing the already insufficient supply of child care spots.
- + **LOW WAGES** – Because the wages earned by child care workers are so low, providers struggle to attract and retain staff. This results in high turnover that increases costs and decreases the quality of care they can provide to children.
- + **HIGHER BUSINESS COSTS IN TARRANT COUNTY** – Tarrant County's higher cost of living creates higher rent, labor, and material costs for providers. These costs are becoming harder to absorb with ongoing higher inflation. In many cases, this means providers must increase what they charge parents. The higher cost of living also means that personal costs are high, which makes working in a low wage industry like child care less attractive.
- + **GROWTH OPPORTUNITIES FOR TRS** – Despite the program's financial incentives and certification of quality, only 33% of eligible providers in the county participate in Texas Rising Star (TRS), signaling opportunities for growth.

KEY OPPORTUNITIES FOR LOCAL LEADERS TO INCREASE THE SUPPLY AND QUALITY OF CHILD CARE SERVICES IN TARRANT COUNTY

Local leaders can help offset the high costs and associated workforce challenges facing child care businesses and improve quality. Potential actions include:

- + **SUPPLEMENT WAGES** – Directly supplementing teachers’ wages could help stabilize the workforce in the short term while simultaneously decreasing one of the sector’s biggest cost drivers.
- + **EXPLORE THE POTENTIAL OF SUBSIDIZED SUBSTITUTE POOLS TO ALLEVIATE WORKFORCE CHALLENGES** – In addition to the challenge of finding permanent workers, several providers stated that they struggled to find substitutes, diminishing the quality of their care. Subsidizing a pool of substitute teachers could make providers more resilient to the tumultuous labor market and potentially enable them to provide full-time staff with more time off.
- + **SUBSIDIZE RENT** – Providing rental assistance could lower the overhead costs of providers that rent their program site and free up resources to address other needs.
- + **PROVIDE PROPERTY TAX RELIEF** – Similar to rental assistance, property tax relief could reduce the overhead costs for providers that own the site of their business.
- + **SUPPLEMENT THE TEXAS WORKFORCE COMMISSION’S TRS FUNDING WITH LOCAL DOLLARS** – Supplementing this allocation with local funding would leverage TRS to further support quality providers and increase the incentives to pursue certification.
- + **LEVERAGE COST-SHARING TO LOWER MATERIALS COSTS AND INCREASE ACCESS TO PROFESSIONAL SERVICES** – Developing purchasing alliances for child care businesses would allow them to buy goods in bulk and pool resources for professional services. This could reduce both operating costs and the amount of time they spend on administrative tasks rather than caregiving. TRS might serve as one such tool for organizing providers.
- + **EXPAND SHORT-TERM FINANCING SOLUTIONS TO SUPPORT PROVIDERS PURSUING QUALITY** – During focus groups, TRS-certified providers stated that they often “front” the various costs associated with improving the quality and are reimbursed later, straining their finances. Equipping providers with more options for short-term financing might enable them to pursue quality-oriented improvements.
- + **MAXIMIZE THE BENEFITS FOR QUALITY PROVIDERS THAT PARTICIPATE IN THE ROLLOUT OF THE STATEWIDE PUBLIC PRESCHOOL SYSTEM** – House Bill 3, which expands public preschool to low-income families across the state, has the potential to remove three- and four-year-olds from the private child care market for much of the day. Because this age group requires fewer staff than infants, they generate revenue for providers that helps subsidize care for younger children. Local leaders should encourage school districts to partner with private child care businesses and support providers to help them through this change.

KEY OPPORTUNITIES FOR LOCAL LEADERS TO LEVERAGE CHILD CARE BUSINESS OWNERS' EXPERTISE

Many of Tarrant County's current child care challenges, especially those related to COVID and inflation, are best understood by engaging with child care business owners. Owners' unique insights into the child care system and the families they serve makes them crucial participants in discussions and decisions. Key actions related to leveraging owners' current insights and developing more efficient pathways for soliciting their input include:

- + **WORK WITH PROVIDERS TO AUDIT LOCAL REGULATIONS TO ENSURE THEY DO NOT CREATE UNNECESSARY BURDENS** – Based on the recent success in Grand Prairie, encouraging a countywide review of regulations that impact child care businesses could reveal additional opportunities to lessen unnecessary burdens while preserving important health and safety requirements.
- + **PRIORITIZE WORKING WITH PROVIDERS NOW ON THE ROLLOUT OF HOUSE BILL 3** – While the broader impacts of House Bill 3 on the child care sector are yet to be determined, local leaders can preemptively work with businesses to mitigate the potential negative impacts on staffing and revenue described above. Business owners will be among the first to know the new legislation's impacts as it is implemented, and are therefore critical players in developing effective local responses.
- + **ADVOCATE FOR TARRANT COUNTY'S CHILD CARE BUSINESSES AT THE STATE LEVEL** – In some instances, the most effective action to support Tarrant County's child care businesses is lobbying for rational changes to state-level policies and programs. Local elected officials, philanthropies, non-profits, and advocates can work alongside child care business owners to uplift concerns and potential solutions to the state legislature. Doing so can benefit not only the child care businesses in Tarrant County, but also those across the state. This approach has already proven successful. Just recently, the State Legislature passed a bill intended to address concerns over the fairness of TRS assessments in response to advocacy by providers.
- + **EXPLORE THE POTENTIAL FOR EXPANDING VIRTUAL LEARNING OPTIONS TO HELP CHILD CARE BUSINESSES MEET REGULATORY AND CERTIFICATION REQUIREMENTS** – The cancellation of in-person learning events resulted in many providers struggling to obtain the continuing education credits required to meet regulatory requirements. Further expanding and publicizing virtual learning options would increase access for business owners and make it easier for them to maintain their required training. Consideration should also be given to ensuring that all providers have adequate access to the technology and internet needed to make use of online opportunities.
- + **CONVENE CHILD CARE BUSINESS OWNERS AND COMPENSATE THEM FOR THEIR TIME AND EXPERTISE** – From their position on the frontlines of child care, business owners have the most accurate real-time information on the sector. However, they also often work long hours of physically demanding labor and often bring administrative work home to finish after hours. Providing compensation in exchange for input from business owners encourages not only increased participation but also valorizes the expertise they hold.

+ **DEVELOP STRONGER COMMUNICATION LINES BETWEEN CHILD CARE BUSINESSES AND PUBLIC AGENCIES** –

As formal regulations transitioned to recommended guidance over the course of the pandemic, providers had to make difficult decisions about how to operate their business. Disruptions were often met with anger from parents, and providers did not always know how to respond. Developing stronger communication lines between providers and public agencies could reduce future uncertainty and support the creation of unified guidance that fosters consistent communication with parents.

+ **FURTHER LEVERAGE TRS AS A GRASSROOTS ORGANIZING TOOL** –

The child care sector is notoriously unconsolidated, leaving business owners few opportunities to organize themselves. Despite being a statewide program, TRS could be leveraged by local leaders to create a more formalized network of providers. Doing so would not only provide business owners with more potential to organize but could serve to increase local providers' participation in the program.

STUDY DETAILS

FINDINGS IN THIS STUDY are based on a survey of 118 directors and owners of child care businesses and focus groups with 26 child care providers conducted in late 2021 and early 2022 in Tarrant County. It is also informed by the analysis of economic and employment data collected by the State of Texas and the federal government.

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INTRODUCTION

LIKE COMMUNITIES ACROSS the United States, the child care system in Tarrant County, Texas, finds itself at a crossroads. Despite decades of poorly aligned investment and persistent structural challenges, child care providers, advocates, and local leaders have laid much of the foundation for a child care system that would provide

system. Many child care businesses have closed, and others are barely hanging on, exacerbating the long-running lack of supply. High-quality child care is still too expensive, and the available funding is insufficient. 2022 is thus a critical moment for the Tarrant County child care system. Renewed state and federal interest, together with the wider recognition of

ALMOST TWO THIRDS OF TARRANT COUNTY CHILDREN – AND 60% OF THOSE UNDER THE AGE OF SIX – LIVED IN FAMILIES WHERE ALL PARENTS WERE IN THE LABOR FORCE

the central importance of child care driven by the COVID pandemic, have created opportunities to make real improvements to expand the supply of high-quality child care in the county. Missing those opportunities risks not only the future of Tarrant

affordable, high-quality child care to families in Tarrant County. In its 2021 session, the Texas Legislature passed seven different bills designed to support the provision of high-quality child care in the state.² More recently, Tarrant County leaders voted to spend \$45 million in American Rescue Plan Act funds to support and expand child care.³ Also, child care business owners in the county have successfully organized to reform local regulations that were unnecessarily restricting their operations. At the same time, the years of the COVID pandemic have placed new strains on the still-fragile child care

County's children but also all the hard-fought gains of local child care businesses and advocates.

This report presents the findings from a study of barriers to providing high-quality child care in Tarrant County. The findings shed light on how the child care system is working, the challenges that remain, and the opportunities for elected officials, philanthropies, non-profits, and other advocates to work alongside child care providers to create a more just and sustainable child care economy that meets the needs of children, parents, and providers.

THE SITUATION IN TARRANT COUNTY

+ THE SUPPLY OF CHILD CARE, ESPECIALLY HIGH-QUALITY CHILD CARE, IS INSUFFICIENT TO MEET THE NEED OF TARRANT COUNTY FAMILIES, AND COVID HAS EXACERBATED THE SHORTAGE. – The current number of available child care spots in Tarrant County is insufficient to meet demand, according to data analyzed in this study and a recent report by the Texas Policy Lab. In 2019, the county was home to 547,098 children, including 173,142 under the age of six. Of those under the age of six, 60% (104,351) lived in families where all parents were in the labor force. The Texas Department of Family and Protective Services lists 472 licensed center-based child care programs, 111 licensed home-based programs, and 252 registered but unlicensed home-based programs in the county. Together, these programs can accommodate only 68,383 children. While determining age and schedule-specific capacities is somewhat complicated, the number of spots provided by these programs is considerably less than even the 104,351 children under six with all parents in the labor force (**Table 1**). The COVID pandemic placed additional burdens on this limited supply by forcing some providers to close their doors permanently. Since the quality of care varies by provider, the supply of high-quality spots is even more constrained. This shortage in child care spots places a strain on families and may limit their workforce opportunities and the economic growth of Tarrant County.

(Table 1)
DEMAND FOR CHILD CARE IN TARRANT COUNTY

Children Under the Age of 6 in Tarrant County	173,142
Childrent Under 6 with All Parents in the Workforce	104,351
Total Child Care Spots	68,383

+ COMPENSATION FOR CHILD CARE WORKERS IS SO LOW THAT PROVIDERS STRUGGLE TO HIRE AND RETAIN STAFF. THIS INCREASES THEIR COSTS AND DIMINISHES THE QUALITY OF CARE THEY PROVIDE. – In focus groups, providers noted that one of the most difficult challenges in operating their business was finding and retaining qualified staff. In 2021 in the Dallas-Fort Worth-Arlington metropolitan area, the average salary for child care workers (\$25K) was less than half that of kindergarten teachers (\$60K).⁵ Additionally, less than half of child care businesses provide health care coverage to their workers, according to data collected in this study. In today’s tight labor market, workers have considerable choice about where to work, and the combination of demanding work and relatively low compensation in the child care sector makes it difficult to attract and retain workers. Restaurant servers and manicurists earn about the same as child care workers, and animal caretakers and bank tellers earn more (**Table 2**). These struggles were noted by numerous providers who described staff frequently quitting with little or no notice, saying that new staff would often “go to lunch and never come back.” This high turnover environment creates additional costs for providers (in the form of time and resources spent hiring new workers). Research has also shown that high turnover among workers undermines the quality of care provided.⁶

(Table 2)

WAGES OF SELECTED OCCUPATIONS IN THE DFW ARLINGTON METRO AREA ⁷

OCCUPATION	ANNUAL MEAN WAGE
Waiters and Waitresses	\$25,240
Child Care Workers	\$25,360
Manicurists and Pedicurists	\$25,970
Animal Caretakers	\$28,700
Tellers	\$34,330

- + **COSTS FOR MANY THINGS IN TARRANT COUNTY ARE HIGH COMPARED WITH THE REST OF THE METRO AREA AND THE STATE, MAKING IT MORE EXPENSIVE TO OPERATE A CHILD CARE BUSINESS** – Compared with more suburban and outlying counties in the DFW metropolitan area, to say nothing of the more rural parts of Texas, the cost of living in Tarrant County is quite high. This impacts the cost of child care via higher rents, higher labor costs, and higher materials costs. In 2020, the average annual salary of a child care worker in Tarrant County was 12% higher than in Wise County, 23% higher than in Johnson County, and 64% higher than in more outlying Cooke County. ⁸ These higher costs hurt businesses because they are not accompanied by higher revenues. A 2020 study by the Texas Institute for Child and Family Wellbeing at UT Austin found that the average daily child care rate in Tarrant County was only 3.5% higher than in surrounding counties (Dallas excepted). ⁹ Conversely, these higher labor costs may not benefit child care workers (if they live in more expensive counties like Tarrant) because their expenses are also subject to the higher cost of living in those counties.

- + **33% OF ELIGIBLE PROVIDERS IN THE COUNTY PARTICIPATE IN TEXAS RISING STAR, THE STATE’S MAIN PROGRAM TO MONITOR AND SUPPORT QUALITY AMONG CHILD CARE PROVIDERS. THIS LEAVES QUITE A BIT OF ROOM FOR GROWTH.** – Since 1991, communities across the state have relied on the Texas Rising Star (TRS) program administered by local workforce development boards to evaluate the quality of their child care programs. TRS is also a key element of the Texas Workforce Commission’s child care services program, which provides subsidies to lower income families to help pay for child care. The program assigns quality ratings and provides technical and financial support to participating child care providers. A 2021 law will require all eligible providers to participate in TRS, but these eligible providers account for only 54% of child care businesses in the county. ¹⁰

MAIN FINDINGS

EVEN WITH THE CHILD CARE INDUSTRY'S STRUCTURAL CHALLENGES (AND THE BROADER ISSUES FACING THE SERVICE ECONOMY), THERE ARE STILL CRUCIAL OPPORTUNITIES FOR LOCAL AND STATE LEADERS TO INCREASE THE SUPPLY AND QUALITY OF AVAILABLE CHILD CARE SERVICES, WHICH ARE A CRITICAL PUBLIC GOOD.

LIKE ALL BUSINESS OWNERS, child care business owners must balance costs and revenues month after month. But the unique economic, social, and cultural role of child care in the United States has left these businesses with fundamental structural challenges that undermine business owners and hamper efforts to improve the quality of care provided to children. Revenues are often barely sufficient to cover costs, and yet for many families child care is still too expensive. Workers are under-paid, making hiring difficult and increasing turnover. Regulations, many of which are necessary and well-intentioned, are sometimes designed and implemented without sufficient input from child care business owners who then must deal with unintended and unnecessary burdens they create. Margins for child care businesses are so small that quality-improving investments require outside support.

REVENUES ARE OFTEN BARELY SUFFICIENT TO COVER COSTS, YET FOR MANY FAMILIES CHILD CARE IS STILL TOO EXPENSIVE

In the midst of these challenges, child care business owners, workers, parents, and advocates in Tarrant County are working to improve the quality of child care in the county. While increased quality would benefit Tarrant County children and families, it would also increase the cost of child care even more. A cost model used in this study showed that the monthly costs for a child in a typical home-based child care business increased from \$619 (in a licensed but non-TRS-certified provider paying current wages) to \$1,332 (for a 4-star TRS provider paying wages on par with those earned by kindergarten teachers).

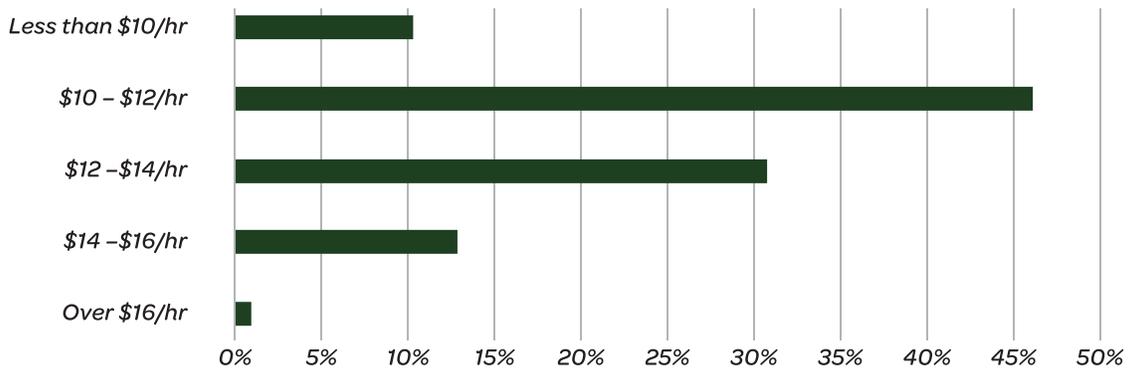
The findings in this section shed light on the challenges facing the child care sector in Tarrant County, but also the many different opportunities for local leaders and advocates to work alongside child care business owners to strengthen and improve the county's child care system.

MORE MONEY AND BETTER BENEFITS FOR WORKERS WOULD INCREASE QUALITY

CHILD CARE WORKERS are not well compensated in the United States, and Tarrant County is no exception. Data from the U.S. Bureau of Labor Statistics show that the average annual pay for workers in the Child Day Care Services industry was \$24,827 in 2020.¹¹ However, that figure includes higher paid managers and program directors, so the salary of an average teacher was even lower. The median starting pay for a teacher with 2-3 years of experience as reported by survey respondents in this study was \$10-\$12 per hour, which translates to between \$20,000 and \$24,000 annually depending upon the number of hours worked (**Figure 1**).¹² By comparison, the average kindergarten teacher in the Dallas-Fort Worth-Arlington metropolitan area earned \$60,660.¹³ Child care workers also earn more meager benefits in their jobs. While two-thirds of respondents worked at child care businesses that offered paid time off, only about 40% provide full-time staff with any health coverage (**Figure 2**). The situation for workers is so dire that only 36% of survey respondents said that they could pay all of their bills each month.

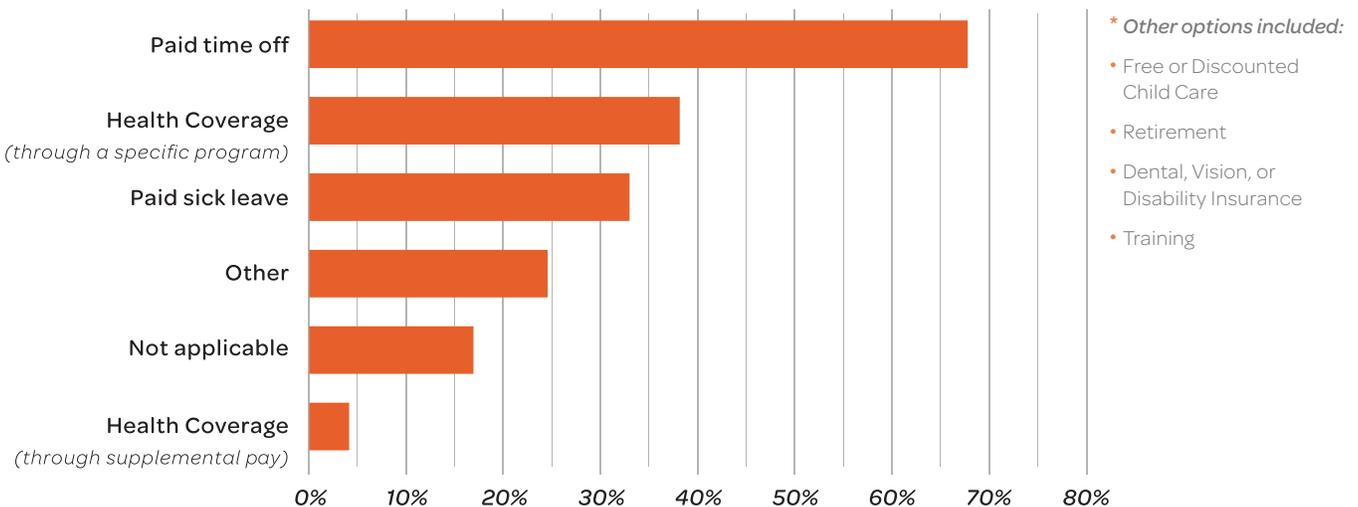
(Figure 1)

WHAT IS THE AVERAGE HOURLY PAY FOR A NEWLY-HIRED TEACHER IN YOUR PROGRAM WITH 2-3 YEARS OF EXPERIENCE?



(Figure 2)

WHAT ADDITIONAL BENEFITS DO YOU PROVIDE TO SOMEONE WHO HAS WORKED FULL-TIME IN YOUR PROGRAM FOR OVER 1 YEAR?



MAIN FINDINGS *(continued)*

The low wages and benefits are not only an issue for the workers themselves. Research has shown that low wages and benefits are linked to higher staff turnover, something that was echoed by providers in Tarrant County. High turnover, in turn, has been linked to lower quality care for children because the child-teacher bonds that are so necessary for language and socio-cultural development fail to form.¹⁴

In child care, staffing is a revolving door . . . before the pandemic, and 100% more during the pandemic.

– Focus Group Participant

That’s the biggest thing, we can’t afford to give them insurance.

– Focus Group Participant

Increasing the wages of child care workers would thus produce a double benefit of improving the lives of workers and improving the quality of care that children receive. However, these increases would impose considerable costs on providers. A cost model developed as part of the study calculated that increasing the wages of child care workers from their current levels to those earned by kindergarten teachers would roughly double the monthly cost of providing care (*Table 3*). Additional local funding is needed to ensure the costs associated with stabilizing the child care workforce are not passed on to already-burdened families.

(Table 3)

COMPARISON OF INCREASED WAGES ON MONTHLY PROVIDER COSTS FOR A TYPICAL CHILD AT A LICENSED CHILD CARE BUSINESS IN TARRANT COUNTY

		CHILD CARE CENTER	CHILD CARE HOME
Labor Costs	Current Level (from survey)	\$554	\$619
	Kindergarten Teacher	\$926	\$1269

OPPORTUNITIES

- + **SUPPLEMENT WAGES** – Directly supplementing wages can help stabilize the workforce in the short-term while simultaneously decreasing one of the sector’s biggest cost drivers. Furthermore, pairing the wage supplements with other incentives, such as bonuses for staff that stay with a program for at least a year, could make child care more competitive among jobs paying a similar wage.¹⁵

MAIN FINDINGS *(continued)*

THE QUALITY STANDARDS IN TRS ALSO INCREASE THE COST OF CHILD CARE, AND THE RESOURCES THAT THE TRS PROGRAM PROVIDES TO CHILD CARE BUSINESSES MAY NOT BE SUFFICIENT TO COVER THOSE COSTS, OPENING AN OPPORTUNITY FOR LOCAL LEADERS TO PROVIDE ADDITIONAL SUPPORT.

THE TRS PROGRAM includes a wide range of quality standards, one set of which are explicitly required at each level and another set that are not individually required but from which providers must earn a minimum number of points in their score. As they secure higher levels of TRS certification, the potential sources of cost increases for providers include hiring additional staff to decrease child-teacher ratios, increasing staff certification levels, and purchasing additional materials and equipment. While higher levels of TRS certification do bring increased revenue from state-subsidized students, those increases may not be sufficient to cover the costs of the program. For example, data from the cost model indicates that the cost for an infant at TRS 4-star provider is approximately one third higher than the cost for an infant in a program meeting minimum licensing standards. However, TRS subsidy rates are only 19 percent higher at the TRS 4-star provider than they are at the provider meeting basic licensing.

Another challenge for providers is that they normally must pay up-front even for reimbursable costs. Participants of the focus groups in this study noted many instances of this. Even relatively small costs (in the hundreds of dollars) can create real problems for child care businesses because they run on such low margins.¹⁶ As a result, modest improvements in materials and equipment may be out of reach for some providers even if TRS would reimburse them.

“On the food program, we’re feeding them the whole month before we get reimbursed.”

– Focus Group Participant

“Everything for us is always reimbursed. So we’re always behind.”

– Focus Group Participant

OPPORTUNITIES

- + **SUPPLEMENT WORKFORCE’S TRS FUNDING WITH LOCAL DOLLARS** – Annually, Workforce Solutions for Tarrant County, the county’s workforce development board, dedicates a share of its budget toward professional development and materials costs for TRS-certified providers in the county. Supplementing this allocation with local funding would leverage TRS further, support quality providers, and increase the incentive to pursue certification.

- + **EXPAND SHORT-TERM FINANCING SOLUTIONS TO SUPPORT TRS-CERTIFIED PROVIDERS PURSUING QUALITY** – During focus groups, TRS-certified providers stated that they often front the various costs associated with improving the quality of their program and are reimbursed later, straining their finances. Equipping providers with more options for short-term, low-interest (or no interest) financing might enable them to pursue more quality-oriented improvements.

WITH ONLY 18% OF THE COUNTY’S ELIGIBLE PROVIDERS PARTICIPATING IN TRS (33% OF THOSE ELIGIBLE), QUALITY IMPROVEMENTS CAN AND MUST BE MADE OUTSIDE OF TRS.

THE TRS PROGRAM is technically open to all child care businesses in Texas that meet a basic set of requirements. However, in order to apply, applicants must agree (on paper) to accept students referred and subsidized through the Texas Workforce Commission’s Child Care Services Program. As of late February 2022, only 18% of the child care businesses in the county were TRS certified. That share increases to 33% when one looks at the subset of child care businesses that have agreed to accept referrals. In 2021 Texas passed H.B. 2607, which would require all child care providers that accept subsidies to participate in the TRS program, which should increase the countywide TRS participation rate to 33%. However, even with that expansion, most child care businesses in the county will not be TRS certified (*Table 4*).

(Table 4)

NUMBER OF CHILD CARE PROVIDERS BY TYPE AND TRS STATUS IN TARRANT COUNTY, TX

	Licensed Center	Licensed Child-Care Home	Registered Child-Care Home	All Types	Percent of Total
All Non-TRS	476	106	260	842	81.9%
Not TRS Eligible	216	64	191	471	45.8%
TRS Eligible	260	42	69	371	36.1%
TRS Total	167	9	10	186	18.1%
TRS 2 Star	29	5	5	39	3.8%
TRS 3 Star	36	2	2	40	3.9%
TRS 4 Star	102	2	3	107	10.4%
TOTAL	427	51	79	1,028	100.0%

MAIN FINDINGS *(continued)*

Given that most child care businesses will still be outside of the TRS program barring another major expansion, those concerned with improving the quality of child care in Tarrant County cannot simply rely on the TRS program. Whether or not they are in the TRS program, providers face the same fundamental challenges (labor costs, low margins, etc.) that make it so difficult to provide high-quality child care.

OPPORTUNITIES

- + **LEVERAGE COST-SHARING TO LOWER MATERIALS COSTS AND INCREASE ACCESS TO PROFESSIONAL SERVICES** – Developing purchasing alliances for child care businesses would allow them to buy goods in bulk and pool resources for professional services.¹⁷ This could reduce both operating costs and the amount of time they spend on administrative tasks rather than caregiving. TRS might serve as one such tool for organizing providers, but efforts should be made to organize non-TRS businesses as well.
- + **EXPAND SHORT-TERM FINANCING SOLUTIONS TO SUPPORT PROVIDERS PURSUING QUALITY** – During focus groups, TRS-certified providers stated that they often “front” the various costs associated with improving the quality and are reimbursed later, straining their finances. Equipping providers with more options for short-term financing might enable them to pursue quality-oriented improvements.

MANY OF THE COSTS ASSOCIATED WITH QUALITY ARE EXACERBATED BY BROADER ECONOMIC TRENDS.

THE STRUCTURAL AND QUALITY-RELATED CHALLENGES facing child care businesses would be difficult on their own, but they are exacerbated by larger economic trends. Within the past year, inflation has reached higher levels than at any time in recent memory. The price increases are felt by everyone, but for cash-strapped child care businesses, their impact can be severe in the form of even slimmer margins, closed businesses, and foregone investments that would have improved the quality of care.

I just bought 30 boxes [of diaper changing gloves] that come 10 to a case for \$215. Two years ago, before COVID, I would have spent less than \$100.

– Focus Group Participant

While inflation has accelerated in recent months, other costs have been increasing for years. Residential rents in the Dallas-Fort Worth metropolitan area have increased nearly every month in the past decade, according to the Bureau of Labor Statistics. Between March 2012 and March 2022, rents increased by 58%.¹⁸ For home-based child care providers, these increases make it more difficult to find a home with adequate space to run their business, and it increases their overhead if they do.

MAIN FINDINGS *(continued)*

The other major cost for child care businesses, labor, is also affected by wider trends. The low unemployment rate of 4.2% in Tarrant County in February 2022 means that workers have considerable bargaining power compared with employers.¹⁹ The low wages and meager benefits in the child care sector make it difficult to attract workers, especially when other options are available. Recent decisions to raise wages by major employers like Walmart and Amazon, along with a rise in flexible gig economy jobs, mean that workers simply have more options (for now).²⁰ In such an environment, child care businesses cannot compete for workers.²¹

“My 15-year old daughter was working at Walmart getting paid \$15 an hour. And I was like “Ouch, I have to raise these teachers’ [pay].”

– Focus Group Participant

Ultimately, the combination of the short- and long-term cost increases faced by child care business owners minimize the portion of the budget that they can devote to paying sustainable wages to attract quality staff.

OPPORTUNITIES

- + **SUBSIDIZE RENT** – Providing rental assistance could lower the overhead costs of providers that rent their program site and free up resources to address other needs.
- + **PROVIDE PROPERTY TAX RELIEF** – Similar to rental assistance, property tax relief would reduce the overhead costs for providers that own the site of their business.
- + **EXPLORE SUBSIDIZED SUBSTITUTE POOLS AS AN OPTION TO ALLEVIATE WORKFORCE CHALLENGES** – In addition to the challenge of finding permanent workers, several providers stated that they struggled to find substitutes, diminishing the quality of their care. Subsidizing a pool of substitute teachers could make providers more resilient to the tumultuous labor market and potentially enable them to provide full-time staff with more time off. However, subsidized substitute pools are still a relatively new approach. While potentially beneficial, subsidized substitute pools have not been implemented for enough time or robustly studied for their overall impact to be known. Furthermore, state-level action is likely required to make the pools feasible since substitutes must adhere to the state’s licensing and certification requirements to be eligible.

MAIN FINDINGS *(continued)*

STATE EFFORTS TO CREATE UNIVERSAL PRE-K THREATEN TO REMOVE 3- AND 4-YEAR-OLDS FROM THE PRIVATE CHILD CARE MARKET, WHICH COULD INCREASE COSTS FOR EVERYONE.

IN TEXAS, as in most places, the required child-teacher ratios are lower for 3–4-year-olds than for infants. Coupled with the fact that labor costs account for the biggest share of provider costs, removing older children from the private child care market would negatively impact the bottom lines for child care businesses by leaving them to serve lower-margin younger children exclusively. In Texas, House Bill 3 has set this process in motion. As schools begin to offer pre-K programs, there is still a role for private child care businesses, but it will take considerable planning and coordination to minimize the negative effect on their businesses.

Based on estimates from the cost model, TRS 4-star businesses lose \$111 per month for each infant they serve, while they make \$107 per month for a 4-year-old and make \$62 a month for a 3-year-old. In order to serve infants without losing money, businesses must maintain a delicate balance of older and younger children to minimize their losses in the infant classroom with the profits made on older children. However, if public school pre-K programs siphon older children from private child care businesses, private businesses will struggle to remain financially sustainable due to being unable to balance their losses from serving infants.

OPPORTUNITIES

- + **MAXIMIZE THE BENEFITS FOR QUALITY PROVIDERS THAT PARTICIPATE IN THE ROLLOUT OF THE STATEWIDE PUBLIC PRESCHOOL SYSTEM** – Local leaders should encourage school districts to partner with private child care businesses and support providers to help them through this change.

ENGAGING CHILD CARE BUSINESS OWNERS IN DECISION-MAKING IS CRUCIAL DUE TO THE IMPORTANT INSIGHTS THEY HOLD INTO THE MORE NUANCED ASPECTS OF THE CHILD CARE INDUSTRY, SUCH AS THE IMPACTS OF ITS NUMEROUS REGULATIONS AND INFORMATION ON EMERGENT THREATS LIKE COVID AND INFLATION.

THROUGHOUT THIS STUDY, child care business owners demonstrated tremendous breadth and depth of knowledge about the challenges facing the child care system, their individual businesses, and the families they served. While many of the child care system's large structural issues are outwardly apparent, others are less obvious and only become evident after engaging with business owners. Due to their first-hand experience of operating within the system, child care business owners are a crucial resource to local leaders for identifying problems and potential solutions within the child care system. They must be included in key conversations and decisions.

This section's findings identify a few of the many issues within the child care system whose resolution requires the input of child care business owners. It highlights the need to empower them not just as participants in discussions but as co-designers of solutions.

MAIN FINDINGS *(continued)*

CHILD CARE BUSINESS OWNERS' PRACTICAL EXPERIENCE WITH THE CHILD CARE INDUSTRY'S REGULATORY MEASURES IDEALLY POSITIONS THEM TO IDENTIFY PROBLEMS AND TO OFFER SOLUTIONS.

WHILE WELL-MEANING and necessary, state and local policies and programs pertaining to child care occasionally impose unintended burdens on the small businesses that comprise the majority of the system. Some of these burdens are minor administrative inconveniences, whereas others are more significant and impose significant costs. Owners' experiences with the day-to-day impacts of these regulatory measures place them in an ideal position to identify both problems and opportunities for improvement.

For example, local regulations like zoning ordinances can create challenges that make it harder for child care businesses to operate. Several focus group participants mentioned that providing child care services in the City of Grand Prairie, Texas, was until recently complicated by a local ordinance that prevented home-based providers from becoming licensed. This seemingly minor regulation had significant (however unintentional) implications for home-based businesses in the area. For one, it effectively limited the number of children they could serve, decreasing their revenue and profits. More surprisingly, it limited the COVID relief funding they could receive through TRS to less than half of the amount they would have received because licensing status was one factor used to determine the amount of relief.

I'm Texas Rising Star, but I feel the same way. I'm a registered home and I want to become licensed, but I'm not getting \$20,000, I'm getting \$8,000 because I'm in lovely Grand Prairie.

– Focus Group Participant

In the time since this study was conducted, home-based providers in Grand Prairie used TRS as a platform to organize a successful grassroots effort to change the restrictive local ordinance. As a result of the change, home-based providers in Grand Prairie will be able to serve more children and become eligible to receive more state and federal funds. No other specific examples of restrictive local regulations were identified in this study beyond the Grand Prairie example, so further investigation is needed to determine if there are other local regulations in Tarrant County that unnecessarily burden providers or restrict child care supply.

State regulations can also create challenges. One of the primary causes of unanticipated burdens stemming from state-level regulatory measures is misalignment between the state's multitude of child care policies and programs, a common trend throughout the US.²³ The problems are not due to any one program but are instead unanticipated by-products from the interactions between them. Misalignment of the many regulatory measures is somewhat unsurprising given their sheer volume and the numerous different agencies that administer them. In Texas, these include the Texas Workforce Commission,

MAIN FINDINGS *(continued)*

Texas Health and Human Services, and the Texas Education Agency, to name a few. Since businesses are constantly working to meet the requirements of the many regulatory measures that apply to them, understanding how those measures interact with each other and where they are sometimes inconsistent is vital for determining their total impact. By engaging business owners, local leaders can surface these issues and work alongside owners to mitigate their impact or lobby for changes at the state level.

The cost model developed in this study was used to investigate two examples of how misalignment between regulatory measures potentially increases business costs and reduces the supply of child care.

MISALIGNMENT OF THE MANY REGULATORY MEASURES IS SOMEWHAT UNSURPRISING GIVEN THEIR SHEER VOLUME AND THE NUMEROUS DIFFERENT AGENCIES THAT ADMINISTER THEM

The first example demonstrates how the different age categories between licensing and TRS can disincentivize providers from serving certain ages. Subsidy rates are broken out into four age categories: Infant, Toddler, Preschooler, and School-Age. However, the ratio and group size requirements that child care centers operate under include six age categories. A child care business serving 3- and 4-year-olds will receive the same subsidy reimbursement amount for these children (the

Preschool amount) even though they must meet smaller group size and ratio requirements for 3-year-olds compared to 4-year-olds. As a result, serving 3-year-olds has a higher cost, but the reimbursement rate is the same as for 4-year-olds, meaning the business has little incentive to serve 3-year-olds.

Similarly, a classroom serving children younger than 18 months must maintain lower ratios and group size than a classroom serving children between 18 and 23 months. However, children in both classrooms would receive the same subsidy reimbursement rate (the infant rate). Again, providers have no incentive to serve children younger than 18 months through the subsidy system if they instead have the option of serving children 18-23 months whose costs are lower while generating the same revenue.

The second example shows how differences between required teacher-child ratios and classroom size regulations may similarly result in decreased supply, over-estimated capacity, or both.

Table 5 shows the teacher-child ratio and group size requirements at licensing and at each level of TRS for infants (under 18 months).

(Table 5)
TEACHER-CHILD RATIOS AND MAXIMUM GROUP SIZES BY TRS LEVEL FOR INFANTS

	LICENSED (NO TRS)	TRS - ☆☆☆	TRS - ☆☆☆☆	TRS - ☆☆☆☆☆
Max. Teacher:Child Ratio	1:4	1:4	1:4	1:4
Max. Group Size	10	10	9	8

MAIN FINDINGS *(continued)*

At lower levels of quality, businesses can theoretically serve more infants. However, because ratios are consistent across the levels, it would not be financially viable for a licensed or TRS 2-star business to serve 10 infants, as doing so would require three teachers in the room to maintain ratios. Thus, revenue for those 10 children would need to be sufficient to cover the cost of three teachers, compared to TRS 4-star, where revenue from 8 children needs to cover the cost of two teachers. As a result, simply reviewing group size requirements may give the appearance that a business can serve more children than they would actually ever choose to based on the costs of employing additional staff to meet ratio requirements.

Several focus group participants also suggested that the time periods for maintaining their licensing and TRS credits were somewhat incongruent, which would occasionally force them to re-take classes to meet the requirements for either licensing or TRS. Participants further underscored how COVID had made it more difficult to obtain their credit hours due to the cancellation of most in-person learning opportunities, leaving many of them feeling concerned about their ability to maintain licensing and TRS. A detailed review of such interactions is beyond the scope of the current project, but these are issues mentioned often enough to merit further exploration.

“So right now, I’ve taken the classes, and they want you to go on CLI Engage [virtual learning platform] to take the class to get the credit hours because when COVID hit, nobody was giving you the hours ... So, I started to get all the hours. And she was like “well, you’re missing two hours.” So, we’re supposed to have 36. I only had 34. So, I had until September the 3rd to get the 36 hours. I couldn’t get all the hours because nobody was offering them so they canceled all [my] hours. I had to start all over and do all my training all over again to get 36 hours.”

– Focus Group Participant

OPPORTUNITIES

- + **WORK WITH PROVIDERS TO AUDIT LOCAL REGULATIONS TO ENSURE THEY DO NOT CREATE UNNECESSARY BURDENS** – Based on the recent success in Grand Prairie, encouraging a countywide review of regulations that impact child care businesses could reveal additional opportunities to lessen unnecessary burdens while preserving important health and safety requirements.
- + **PRIORITIZE WORKING WITH PROVIDERS NOW ON THE ROLLOUT OF HOUSE BILL 3** – While the broader impacts of House Bill 3 on the child care sector are yet to be determined, local leaders can preemptively work with businesses to mitigate the potential negative impacts on staffing and revenue described above. Business owners will be among the first to know the new legislation’s impacts as it is implemented and are therefore critical players in developing effective local responses.

MAIN FINDINGS *(continued)*

- + **ADVOCATE FOR TARRANT’S CHILD CARE BUSINESSES AT THE STATE LEVEL** – In some instances, the most effective action to support Tarrant County’s child care businesses is lobbying for rational changes to state-level policies and programs. Local elected officials, philanthropies, non-profits, and advocates can work alongside child care business owners to uplift concerns and potential solutions to the state legislature. Doing so can benefit not only the child care businesses in Tarrant County, but also those across the state. This approach has already proven successful. Just recently, the State Legislature passed a bill intended to address concerns over the fairness of TRS assessments in response to advocacy by providers.
- + **EXPLORE THE POTENTIAL FOR EXPANDING VIRTUAL LEARNING OPTIONS TO HELP CHILD CARE BUSINESSES MEET REGULATORY AND CERTIFICATION REQUIREMENTS** – The cancellation of in-person learning events resulted in many providers struggling to obtain the continuing education credits required to meet regulatory requirements. Further expanding and publicizing virtual learning options would increase access for business owners and make it easier for them to maintain their required training. Consideration should also be given to ensuring that all providers have adequate access to the technology and internet needed to make use of online opportunities.

CREATING MORE OPPORTUNITIES FOR CHILD CARE BUSINESS OWNERS TO PROVIDE INPUT, ORGANIZE, AND MOBILIZE IS A HIGH-IMPACT STRATEGY FOR IMPROVING TARRANT COUNTY’S CHILD CARE SYSTEM.

THE CHILD CARE SECTOR is notoriously unconsolidated. It is composed of countless small businesses, many of which are home-based, and it has limited forums in which owners can conveniently connect on a regular basis. These characteristics can make it difficult for local leaders to efficiently solicit input from businesses and make it challenging for owners to organize and mobilize. Exploring opportunities to better organize and connect the sector could make it easier for local leaders to tap into the expertise of business owners and empower businesses to lead grassroots efforts.

Business owners have real-time information on the impact that emerging threats like COVID and inflation have on the child care system and the families it serves. This information is invaluable for local leaders trying to quickly develop effective responses to these threats as they evolve. Further connecting the sector and formalizing avenues for engagement could expedite local leaders’ access to the crucial information held by child care business owners and workers. A more organized sector could also potentially support more efficient streams of communication between businesses, public agencies, and parents during emerging threats, a need that was identified in the focus groups. Several participants shared that the lack of clear guidance during the pandemic, and especially after the initial COVID regulations waned, introduced a high degree of uncertainty in running their business.²⁴

What sort of, kind of support, guidance are you getting from the State or Health Department?

None

– Facilitator

– Provider

“There are no guidelines... And a parent was like, “This [temporary closure] is ridiculous. My friends only had to stay out five days over there.”

– Focus Group Participant

CULTIVATING THE CAPACITY FOR MORE COLLABORATIVE APPROACHES IS IMPORTANT NOT ONLY FOR DEALING WITH THE CURRENT THREATS OF COVID AND INFLATION AS THEY EVOLVE BUT ALSO ALL FUTURE THREATS TO TARRANT COUNTY’S CHILD CARE SYSTEM AND FAMILIES WITH YOUNG CHILDREN.

CURRENT PROGRAMS such as TRS could provide the framework for convening and organizing providers. The recent successful effort by business owners in Grand Prairie was led by TRS providers, and it illustrates how they can catalyze change within the system when they are empowered and organized. Providing business owners with more formalized avenues for convening, providing input, and organizing is crucial to improving Tarrant County’s child care system and making it more resilient long-term.

OPPORTUNITIES

- + **CONVENE CHILD CARE BUSINESS OWNERS AND COMPENSATE THEM FOR THEIR TIME AND EXPERTISE –**
From their position on the frontlines of child care, business owners have the most accurate real-time information on the sector. However, they also often work long hours of physically demanding labor and often bring administrative work home to finish after hours. Providing compensation in exchange for input from business owners encourages not only increased participation, but also valorizes the expertise they hold.
- + **DEVELOP STRONGER COMMUNICATION LINES BETWEEN CHILD CARE BUSINESSES AND PUBLIC AGENCIES –**
As formal regulations transitioned to recommended guidance over the course of the pandemic, providers had to make difficult decisions about how to operate their business. Disruptions were often met with anger from parents, and providers did not always know how to respond. Developing stronger communication lines between providers and public agencies could reduce future uncertainty and support the creation of unified guidance that fosters consistent communication with parents.
- + **FURTHER LEVERAGE TRS AS A GRASSROOTS ORGANIZING TOOL –** The child care sector is notoriously unconsolidated, leaving business owners few opportunities to organize themselves. Despite being a statewide program, TRS could be leveraged by local leaders to create a more formalized network of providers. Doing so would not only provide business owners with more potential to organize but could serve to increase local providers’ participation in the program.

CONCLUSION

IN ADDITION TO THE OPPORTUNITIES listed throughout the study, there is a need for greater understanding of child care in Tarrant County. This study investigated Tarrant County's child care system from the perspective of child care business owners, but future efforts should incorporate the views of parents and families as well. Additionally, despite outreach efforts, this study did not include adequate feedback from the Vietnamese or Latino communities in Tarrant County, both of which represent sizeable populations of families. Understanding what works and what does not for them would shine even more light on how Tarrant County can continue to build a child care system that works for everyone.

The challenges facing Tarrant County's child care system have never been greater due to chronic structural issues and acute economic pressures resulting from the COVID pandemic. However, local leaders have also never been more willing to act. After a historic investment in supporting local child care businesses, local leaders have demonstrated that they are eager to step up to support Tarrant County's child care system and families with young children.

1. <https://www.tarrantcounty.com/en/news/2022/CCA-and-Tarrant-County-ARPA-Funding.html>
2. <https://txchildren.org/posts/2021/7/1/report-texas-children-and-the-2021-legislative-session>
3. <https://fortworth.culturemap.com/news/city-life/05-10-22-american-rescue-plan-act-child-care-tarrant-county/>
4. <https://www.texaspolicylab.org/wp-content/uploads/2021/03/County-level-estimates-child-care-supply-and-demand-6-9-20-final.pdf>
5. Bureau of Labor Statistics Occupational Wage and Employment Statistics, May 2021, accessed at https://www.bls.gov/oes/current/oes_19100.htm
6. See this study by the Yale School of Medicine (<https://medicine.yale.edu/news-article/understanding-ece-teacher-turnover/>) and this OECD research Brief (<https://www.oecd.org/education/school/49322250.pdf>)
7. BLS Occ Emp and Wage Stats May 2021 DFW Arlington MSA
8. Bureau of Labor Statistics Quarterly Census of employment and Wages, 2020, accessed at <https://data.bls.gov>.
9. See Table A-3 of raw rates for Tarrant County and the North Central Texas Local Workforce Development Area in <https://txicfw.socialwork.utexas.edu/wp-content/uploads/2020/09/2020-Texas-Child-Care-Market-Rate-Survey-for-Web.pdf>.
10. To be eligible to participate in TRS, providers must agree to accept referrals of children subsidized through the Texas Workforce Commission's Child Care Services program. See <https://texasrisingstar.org/providers/eligibility/> and <https://www.twc.texas.gov/programs/childcare> for additional information.
11. Bureau of Labor Statistics Quarterly Census of Employment and Wages, 2020 Annual Average, Series ENU484395056244
12. The Federal standard is 2080 hours per year, but that includes holidays and paid time off, which are not available to many child care workers.
13. Bureau of Labor Statistics, Occupational Employment and Wage Statistics, May 2021 for Dallas-Fort Worth-Arlington MSA
14. OECD policy brief <https://www.oecd.org/education/school/49322250.pdf>
15. Research from the University of Virginia (2020) found that pay incentives totaling \$1,500 over eight months cut child care teacher turnover in half, down from 29% to 15%, over the eight months. http://www.see-partnerships.com/uploads/1/3/2/8/132824390/pdg_teacher_turnover_study_summary.pdf
16. Most for-profit child care facilities operate on margins less than 1%, according to a report by the U.S. Dept. of the Treasury <https://home.treasury.gov/system/files/136/The-Economics-of-Childcare-Supply-09-14-final.pdf> page 15
17. A recent case study from Capita examines how cross-sector approaches to co-ops can further increase savings, reduce logistical and administrative burdens, and build stronger community networks.
18. <https://fred.stlouisfed.org/series/CUURA316SEHA>
19. Bureau of Labor Statistics Local Area Unemployment Statistics, Series LAUCN48439000000003
20. <https://www.pewresearch.org/internet/2021/12/08/the-state-of-gig-work-in-2021/>
21. <https://www.wsj.com/articles/amazon-emerges-as-the-wage-and-benefits-setter-for-low-skilled-workers-across-industries-11638910694>
22. Loosening zoning regulations has been proposed by policy institutes on both sides of the political aisle as a way to deregulate child care without sacrificing child safety – Center for American Progress & CATO Institute
23. Inconsistencies between licensing and quality systems like TRS have been documented in several states, and often are a product of being administered by different state agencies or departments. https://www.erikson.edu/wp-content/uploads/2021/03/The-shifting_supply_of_regulated_FCC_in_the_US_2021_LITREVIEW.pdf
24. Specifically, providers stated that guidance regarding when to close their facility or how long to keep exposed children home was confusing. They also stated that parents were uncertain about regulations, and that the providers often bore the brunt of criticism for policies beyond their control.

APPENDIX A: METHODOLOGY

THE FINDINGS IN THIS REPORT are based upon a survey and series of focus groups conducted in Tarrant County, Texas from December 2021 and January 2022. The survey participants were owners and directors of child care businesses, including home-based and center-based providers. While most participants were TRS certified, a significant number were not. Recruitment for survey and focus group participants was handled by the Early Learning Alliance.

FOCUS GROUPS

FOCUS GROUPS were conducted on two different Saturdays, Dec. 18, 2021, and Jan. 22, 2022. Focus group participants were as follows:

- Center-based providers, 5 participants predominantly TRS-certified
- Home-based providers, 15 participants predominantly TRS-certified
- Non-certified center-based providers, 6 participants

SURVEY

THE SURVEY was implemented electronically using the Survey Monkey platform. All focus group participants completed the survey before participating in the focus group. Additional responses were gathered through networks of child care providers in Tarrant County identified by the Early Learning Alliance.

In total, the survey generated 118 usable responses from the following types of providers:

PROGRAM TYPE	TRS-CERTIFIED	NON-CERTIFIED	TOTAL
Home-based	15	14	29
Center-based	71	14	85
Other	0	4	4
TOTAL	86	32	118

WHILE EVERY ATTEMPT was made to solicit participants from a range of facility types and certification statuses, in the end TRS-certified centers dominated the survey results. Home-based providers were under-represented in the survey but were well represented in the three focus groups. The least well represented group was non-certified home-based providers. Responses to all survey questions are included in Appendix B.

ANALYSIS OF FOCUS GROUPS

ANALYSIS OF FOCUS GROUP DATA was conducted through transcribed audio recordings that were analyzed by multiple research staff. Formal coding was not conducted, but main themes were developed iteratively with input from multiple research staff.

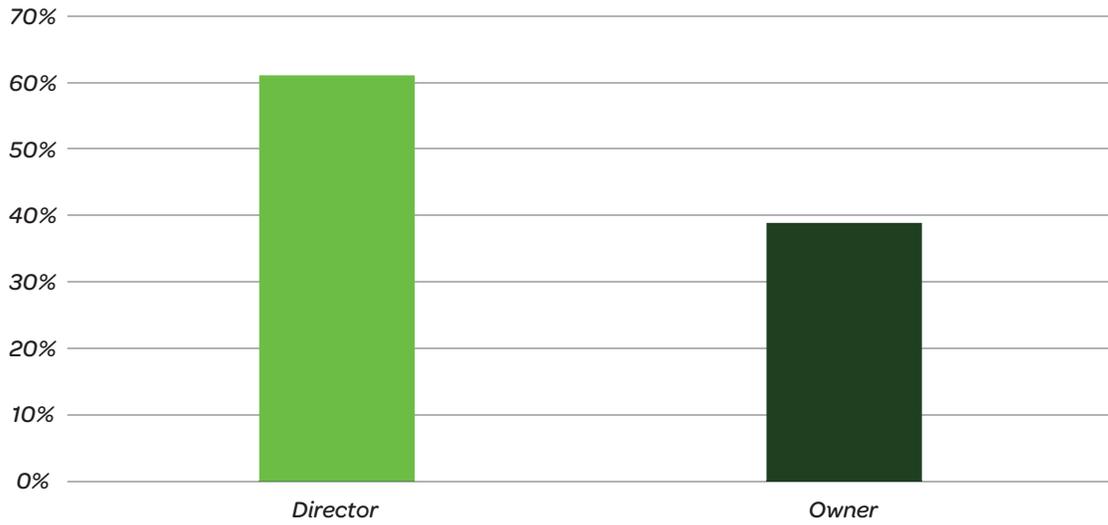
COST OF QUALITY MODEL

THE COST MODEL was developed and implemented by P5 Fiscal Strategies (<https://www.prenatal5fiscal.org/>) and is based on the U.S. Department of Health and Human Services Provider Cost of Quality Calculator.ⁱ It takes into account a wide range of program costs and characteristics to determine a per-child cost to the provider. In the P5FS Tarrant County model, these costs were structured to allow them to increase for providers with higher TRS certification levels. Because these costs are not specifically required by TRS guidelines, such an exercise involves some necessary assumptions. P5FS based the model inputs on data from existing estimates of provider costs, findings from the survey of providers, and the knowledge of experts in Tarrant County.

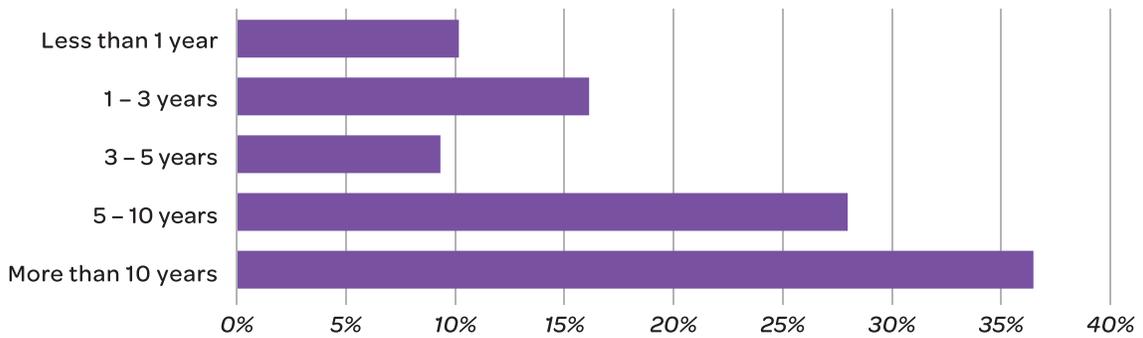
ⁱ Available at <https://childcareta.acf.hhs.gov/pcqc>

APPENDIX B: SURVEY RESULTS

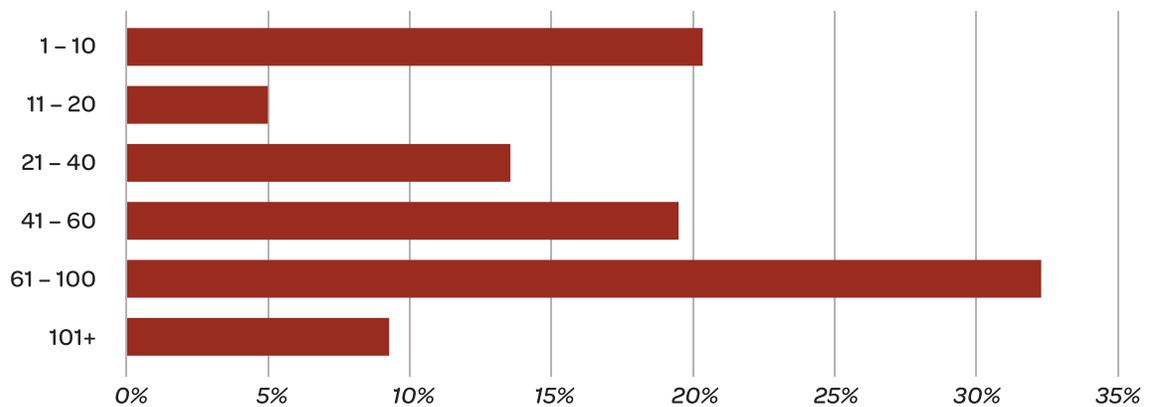
WHAT IS YOUR CURRENT POSITION?



HOW LONG HAVE YOU WORKED AT YOUR CURRENT CHILD CARE FACILITY?

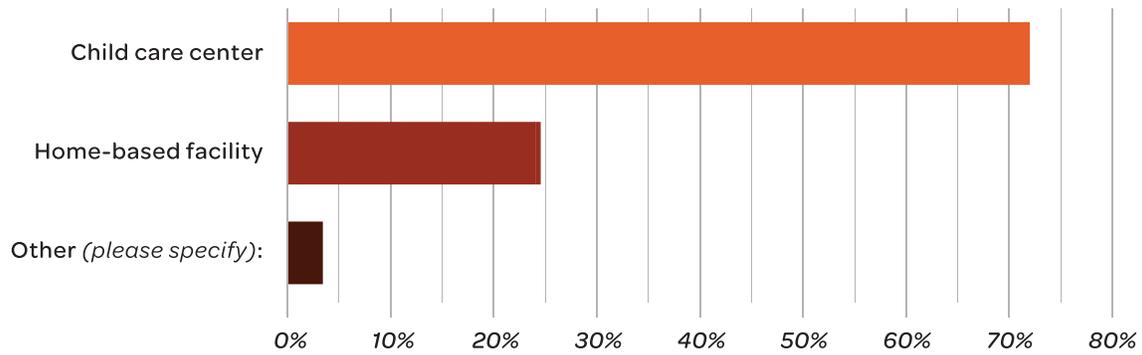


ON AN AVERAGE DAY, HOW MANY CHILDREN DOES YOUR FACILITY CURRENTLY SERVE?

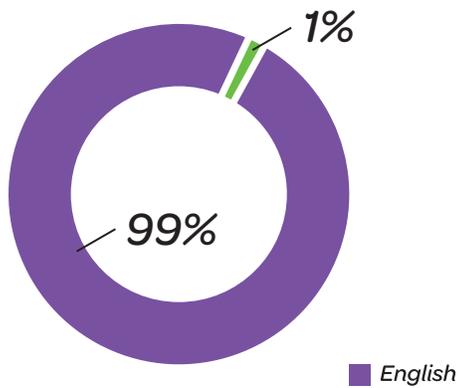


APPENDIX B: SURVEY RESULTS *(continued)*

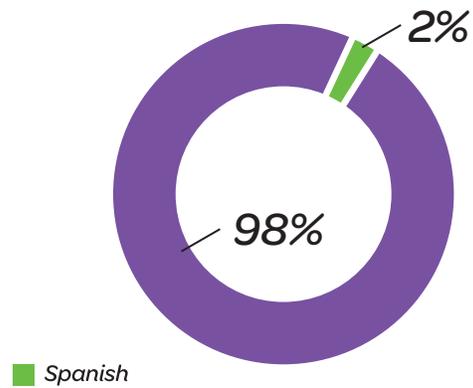
WHAT TYPE OF FACILITY DO YOU WORK FOR?



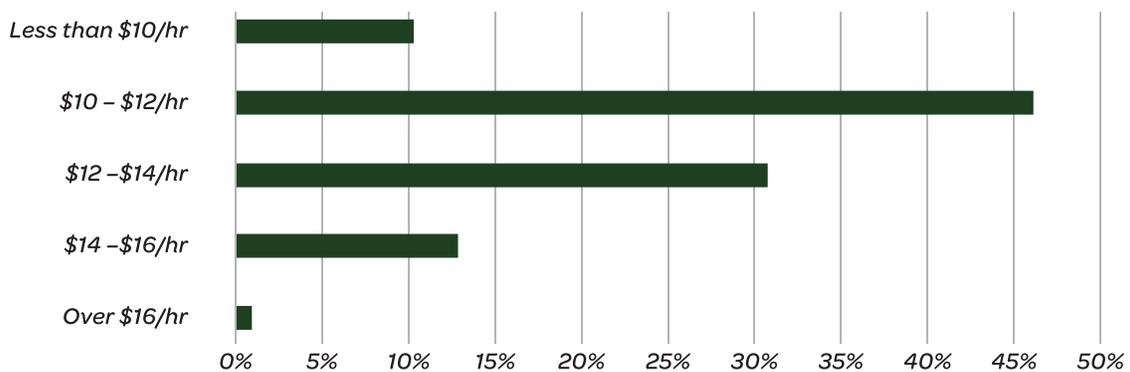
WHAT IS THE PRIMARY LANGUAGE SPOKEN BY **CHILDREN** AT YOUR FACILITY?



WHAT IS THE PRIMARY LANGUAGE SPOKEN BY **STAFF** AT YOUR FACILITY?

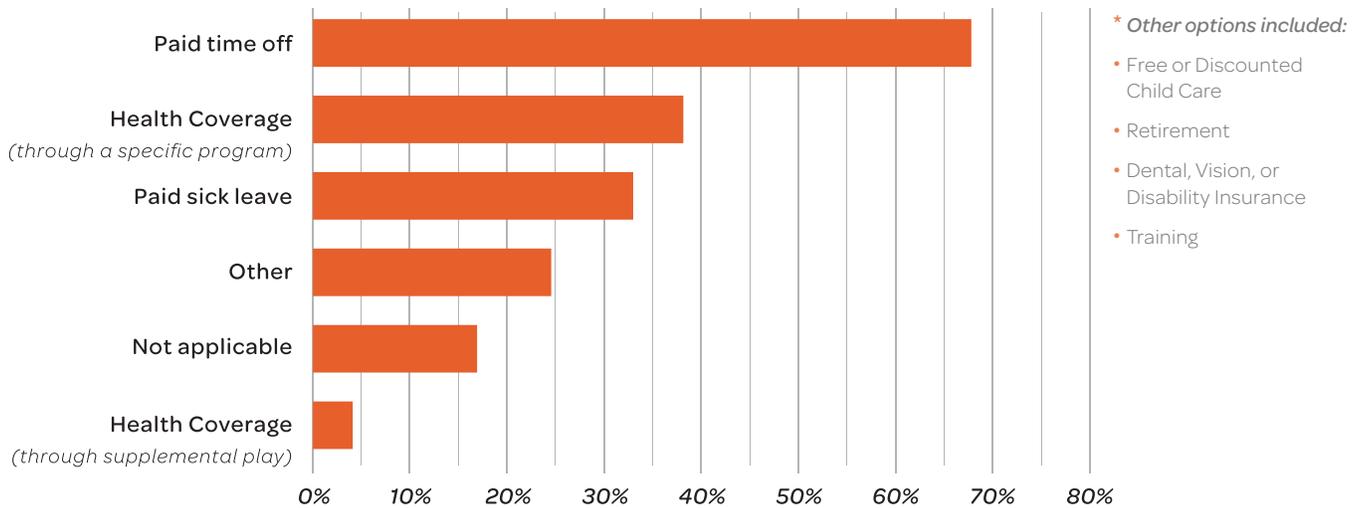


WHAT IS THE AVERAGE HOURLY PAY FOR A NEWLY-HIRED TEACHER IN YOUR PROGRAM WITH 2-3 YEARS OF EXPERIENCE?

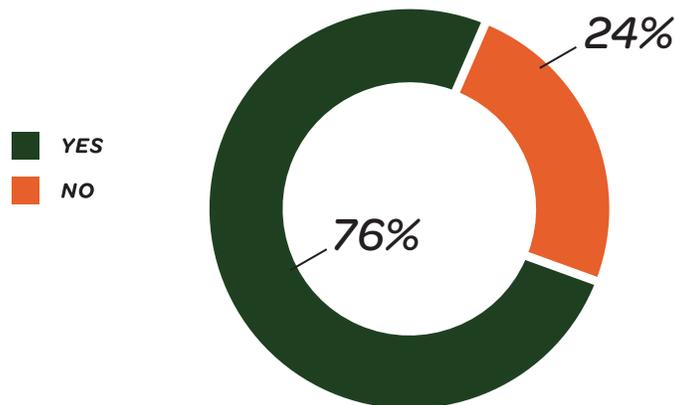


APPENDIX B: SURVEY RESULTS *(continued)*

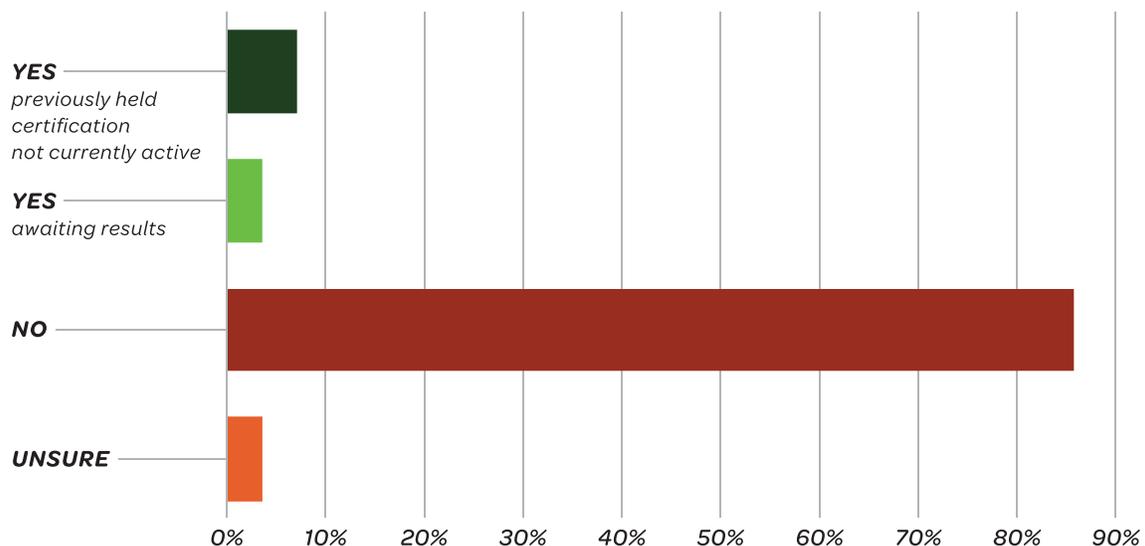
WHAT ADDITIONAL BENEFITS DO YOU PROVIDE TO SOMEONE WHO HAS WORKED FULL-TIME IN YOUR PROGRAM FOR OVER 1 YEAR? *(check all that apply)*



DOES YOUR FACILITY CURRENTLY HAVE A TEXAS RISING STAR CERTIFICATION?

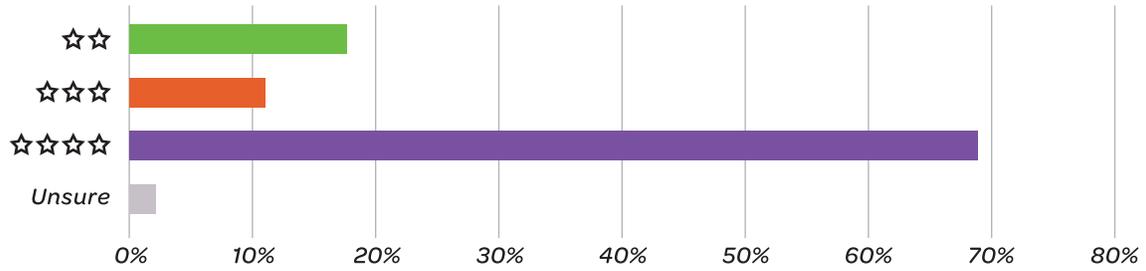


HAS YOUR FACILITY APPLIED FOR TEXAS RISING STAR CERTIFICATION IN THE PAST?

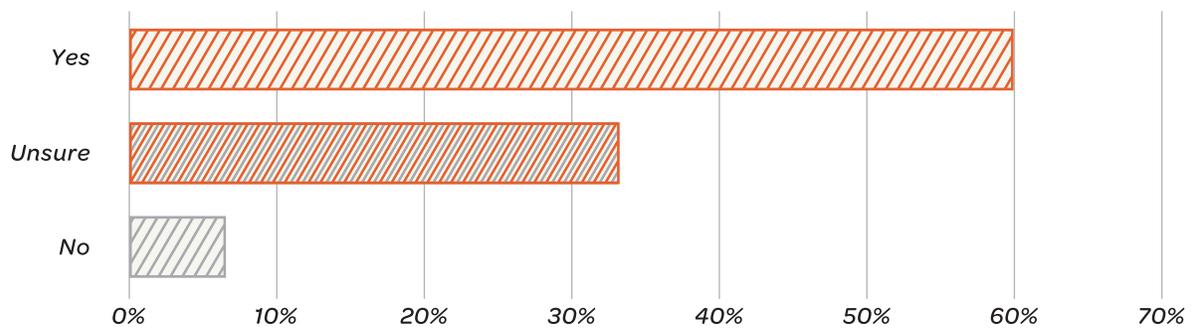


APPENDIX B: SURVEY RESULTS *(continued)*

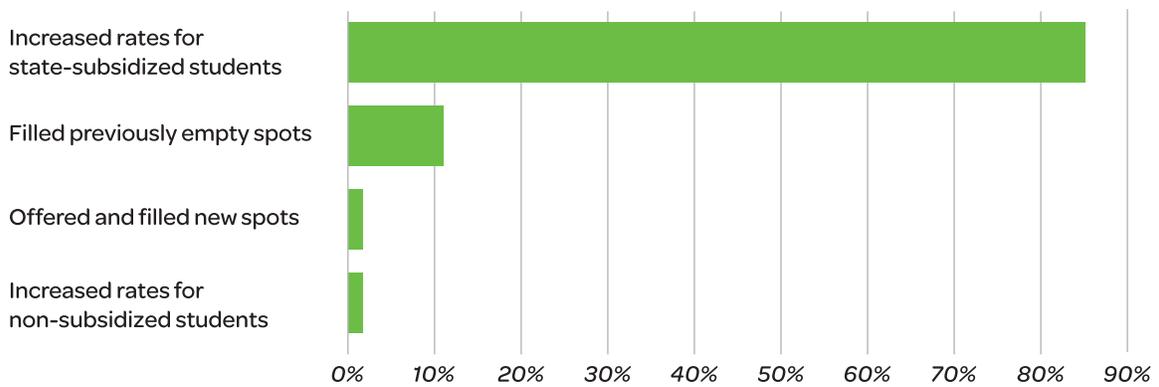
WHAT LEVEL OF TEXAS RISING STAR CERTIFICATION DOES YOUR FACILITY HAVE?



HAS YOUR FACILITY GAINED ADDITIONAL INCOME AFTER BEING CERTIFIED?

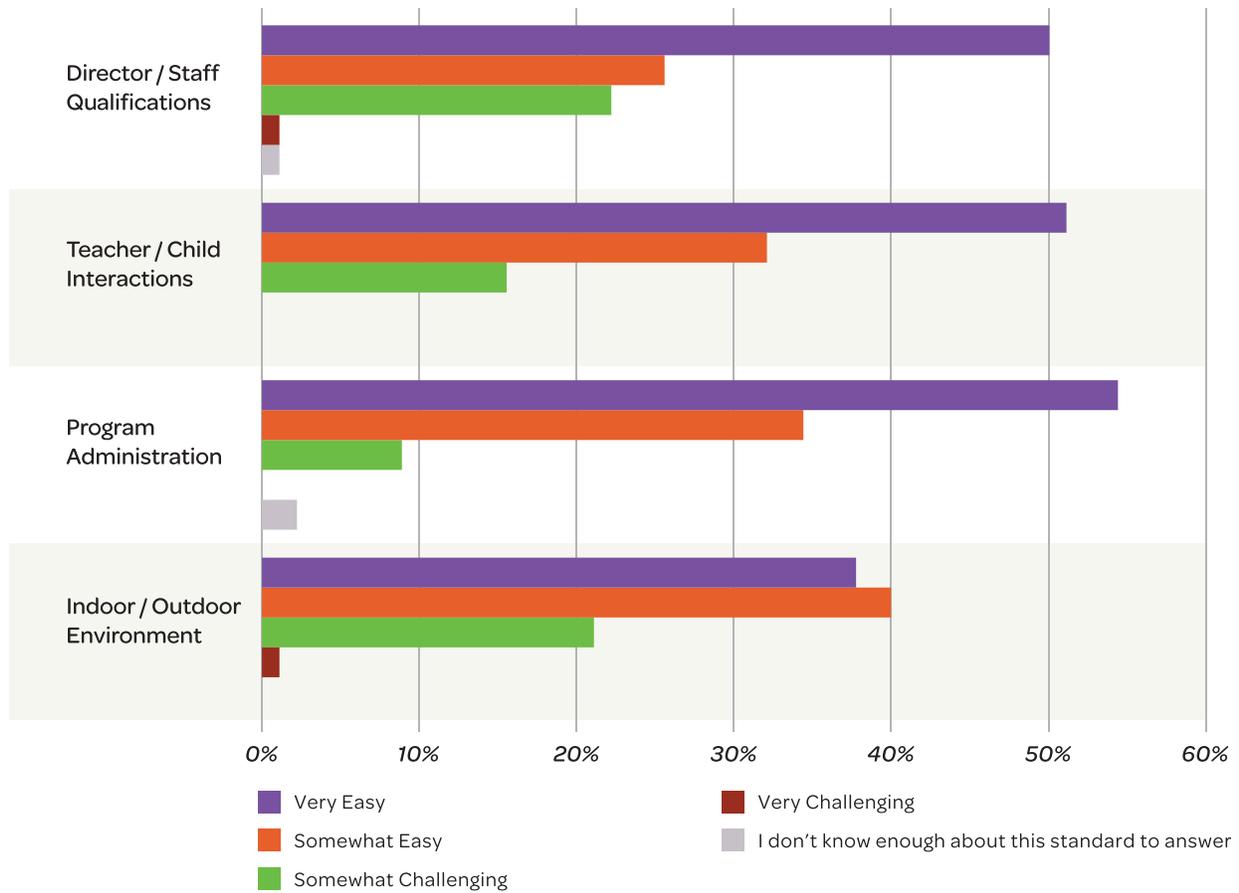


IF YES, WHAT WAS THE SOURCE OF THE INCREASE?

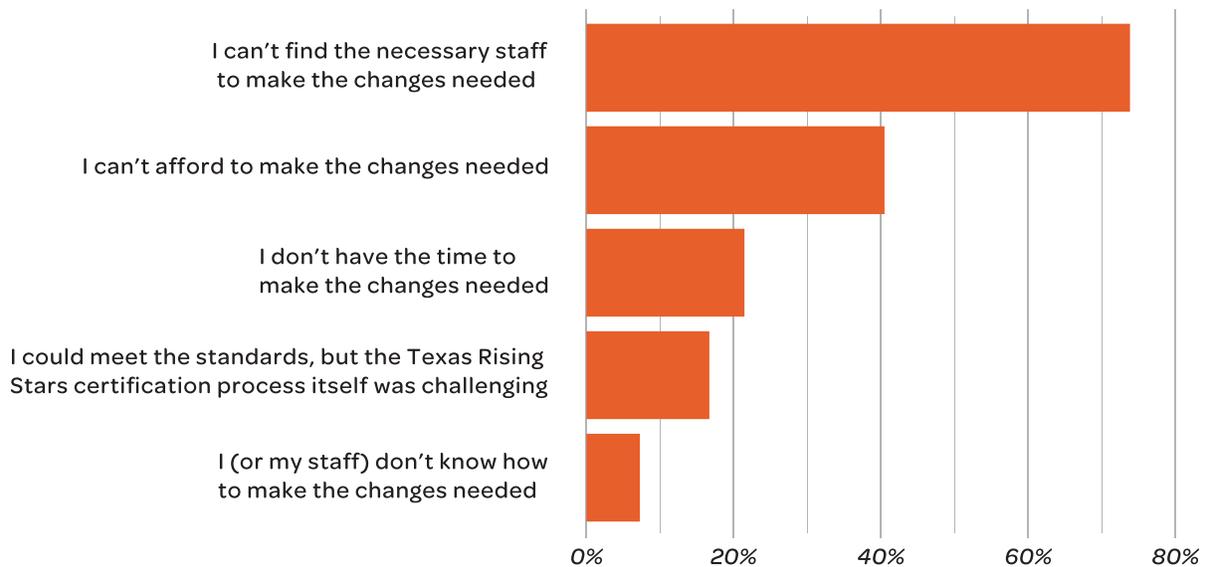


APPENDIX B: SURVEY RESULTS *(continued)*

PROVIDERS' PERCEIVED DIFFICULTY TO MEET SUFFICIENT STANDARDS FOR THE NEXT LEVEL OF CERTIFICATION:

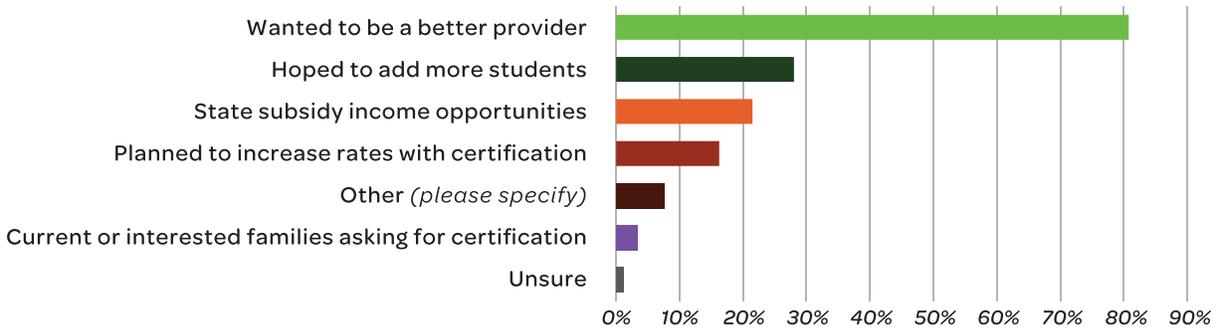


IF SOMEWHAT OR VERY CHALLENGING, WHY? *(check all that apply)*

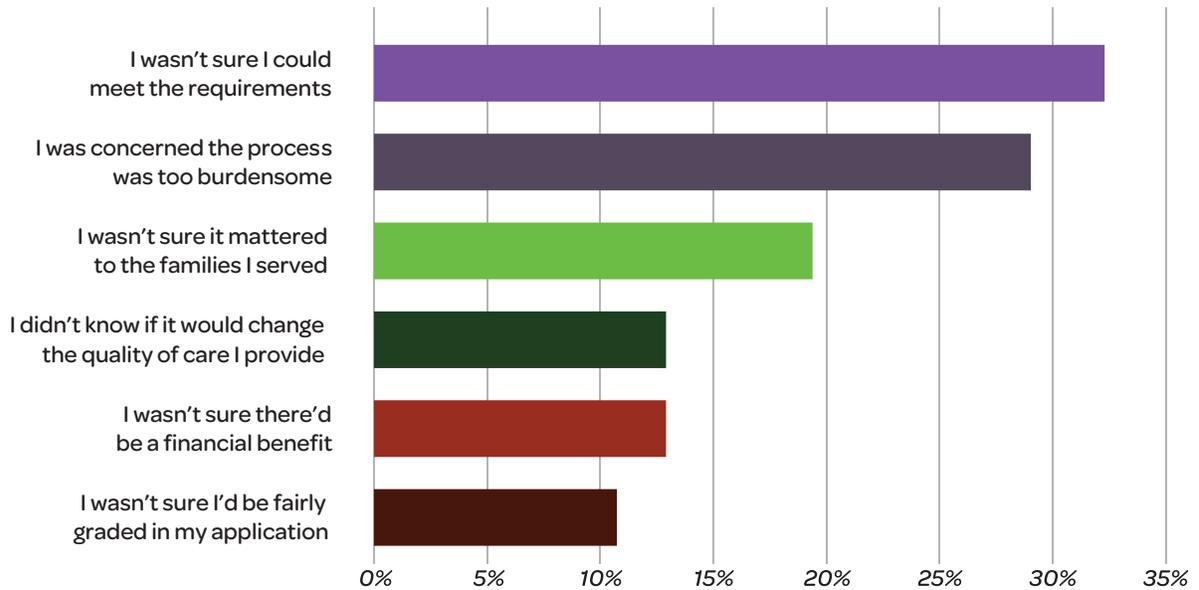


APPENDIX B: SURVEY RESULTS *(continued)*

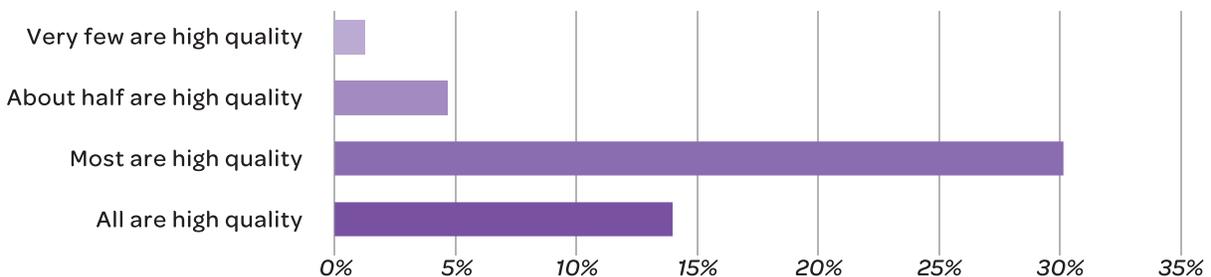
WHAT MOTIVATED YOU TO APPLY FOR TEXAS RISING STAR CERTIFICATION?
(choose up to 2)



DID YOU HAVE ANY OF THE FOLLOWING CONCERNS IN APPLYING FOR TEXAS RISING STAR CERTIFICATION? (choose up to 3)

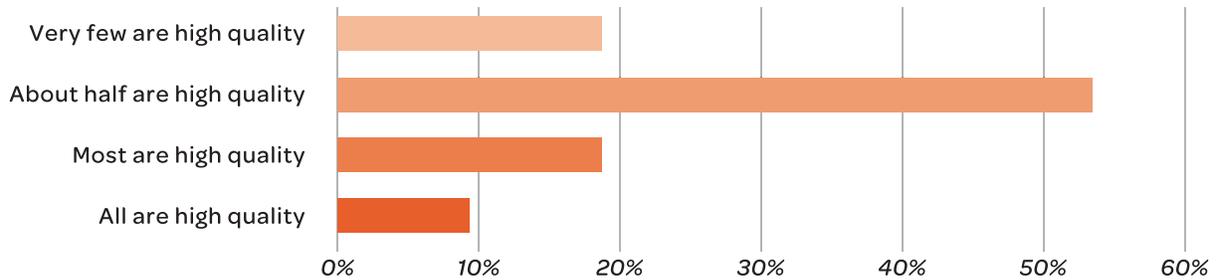


WHICH OF THE FOLLOWING MOST CLOSELY REFLECTS YOUR OPINION ABOUT CHILD CARE PROVIDERS **WITH** A TEXAS RISING STAR CERTIFICATION?

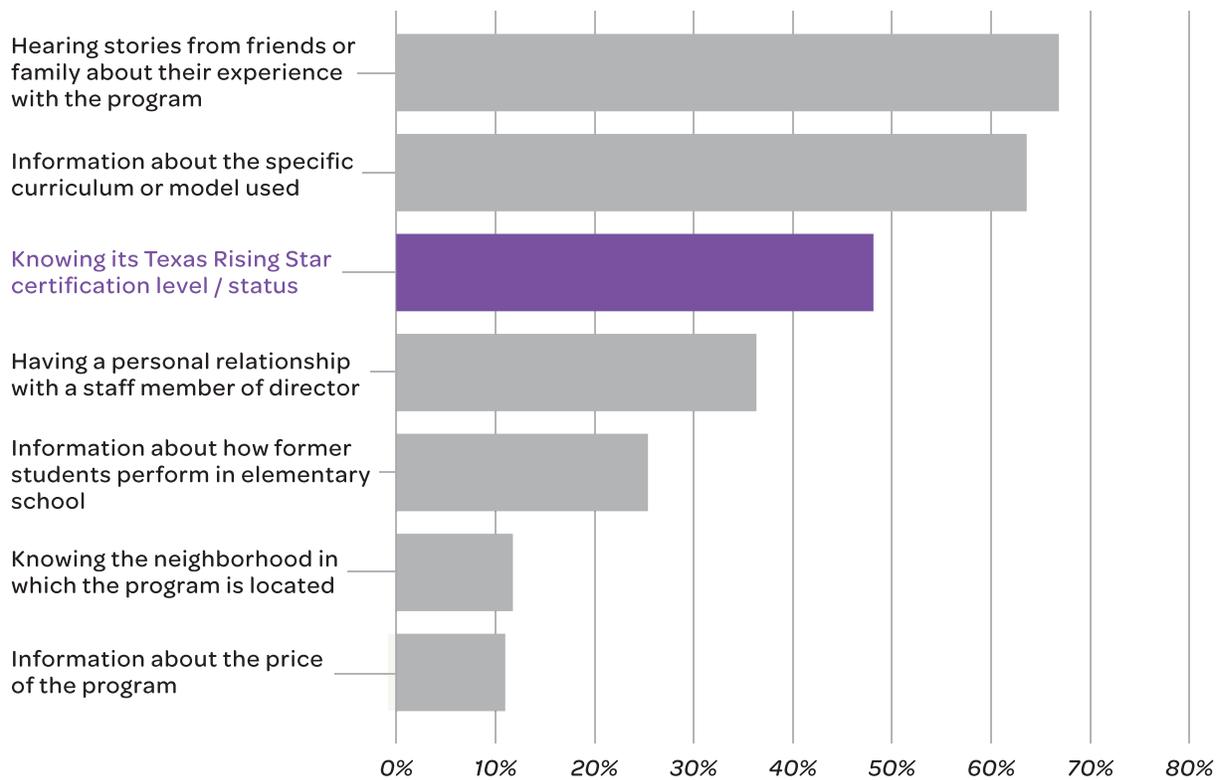


APPENDIX B: SURVEY RESULTS *(continued)*

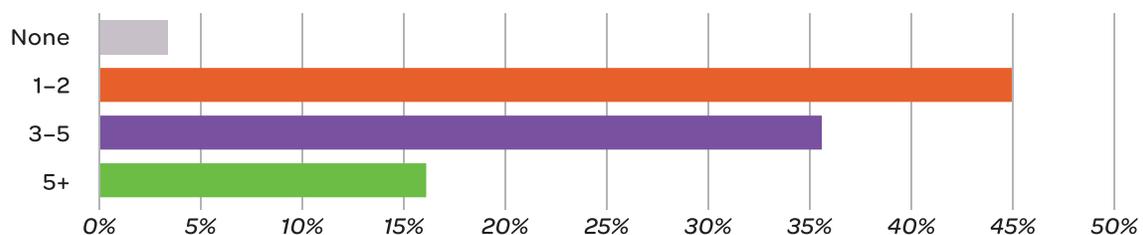
WHICH OF THE FOLLOWING MOST CLOSELY REFLECTS YOUR OPINION ABOUT CHILD CARE PROVIDERS **WITHOUT** A TEXAS RISING STAR CERTIFICATION?



WHICH OF THE FOLLOWING WOULD BE MOST HELPFUL TO YOU IN DETERMINING THE QUALITY OF A CHILD CARE PROGRAM? *(choose up to 3)*

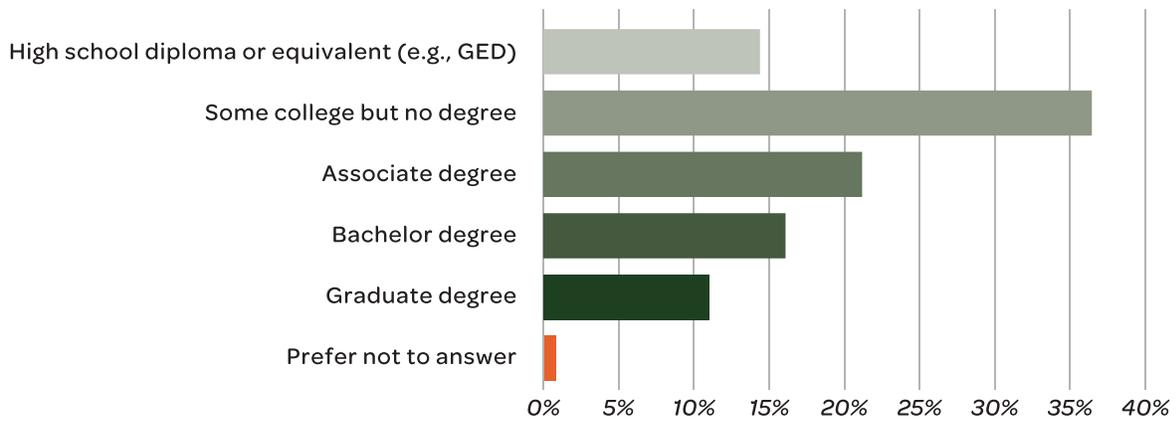


IF A FAMILY MEMBER NEEDED CARE FOR THEIR CHILDREN AND YOU (OR YOUR CENTER) COULD NOT PROVIDE IT, HOW MANY OTHER PROVIDERS IN TARRANT COUNTY WOULD YOU FEEL COMFORTABLE RECOMMENDING?

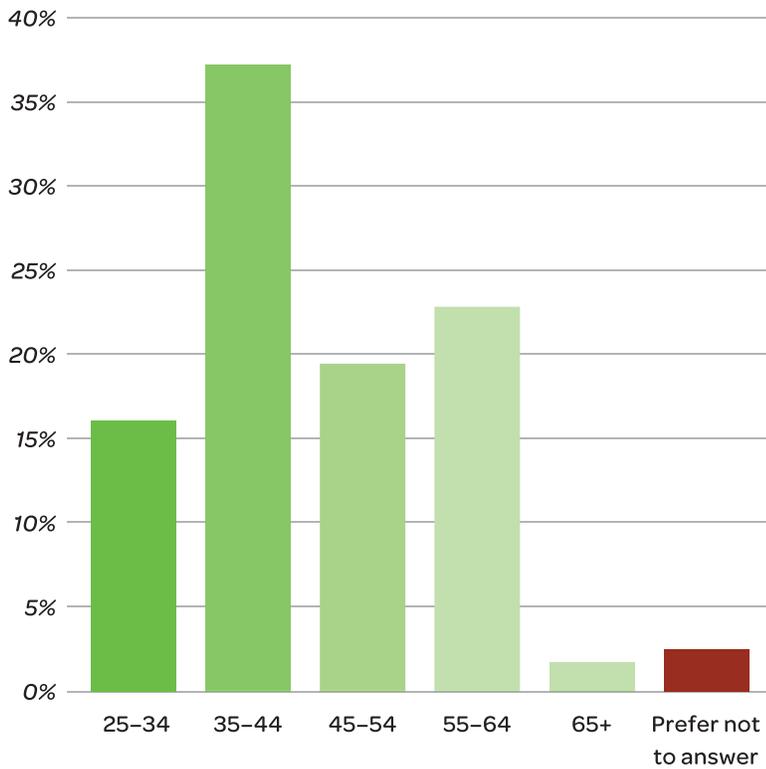


APPENDIX B: SURVEY RESULTS *(continued)*

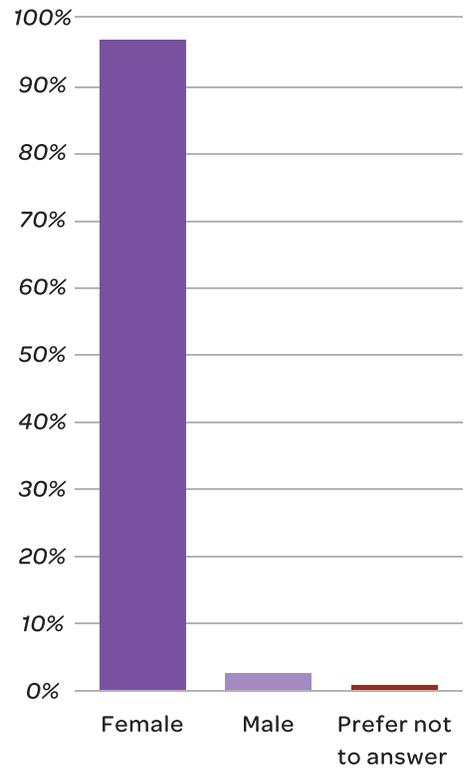
WHAT IS THE HIGHEST LEVEL OF SCHOOL YOU HAVE COMPLETED OR THE HIGHEST DEGREE YOU HAVE RECEIVED?



WHAT IS YOUR AGE?

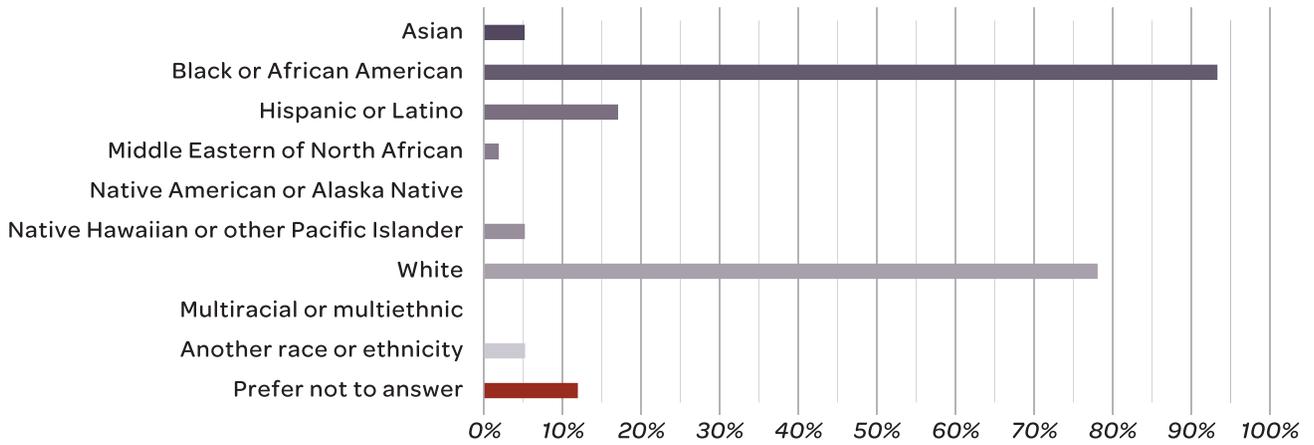


WHAT IS YOUR GENDER?

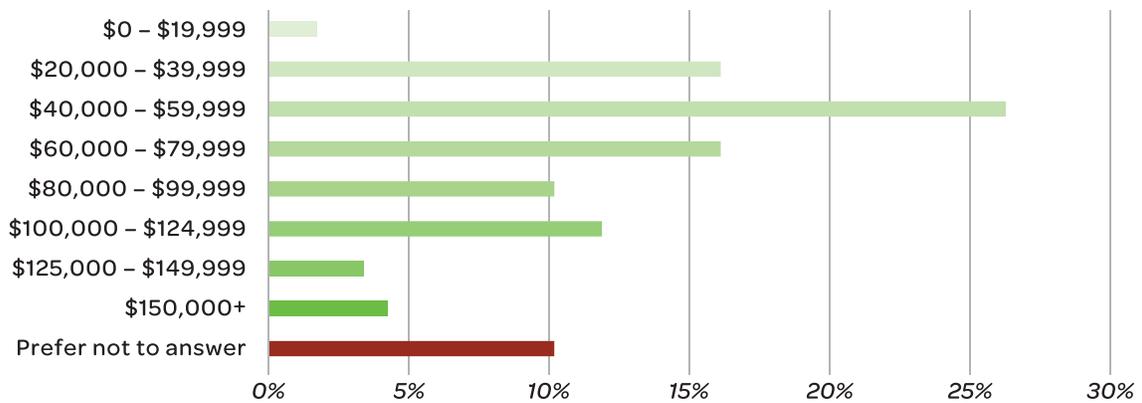


APPENDIX B: SURVEY RESULTS *(continued)*

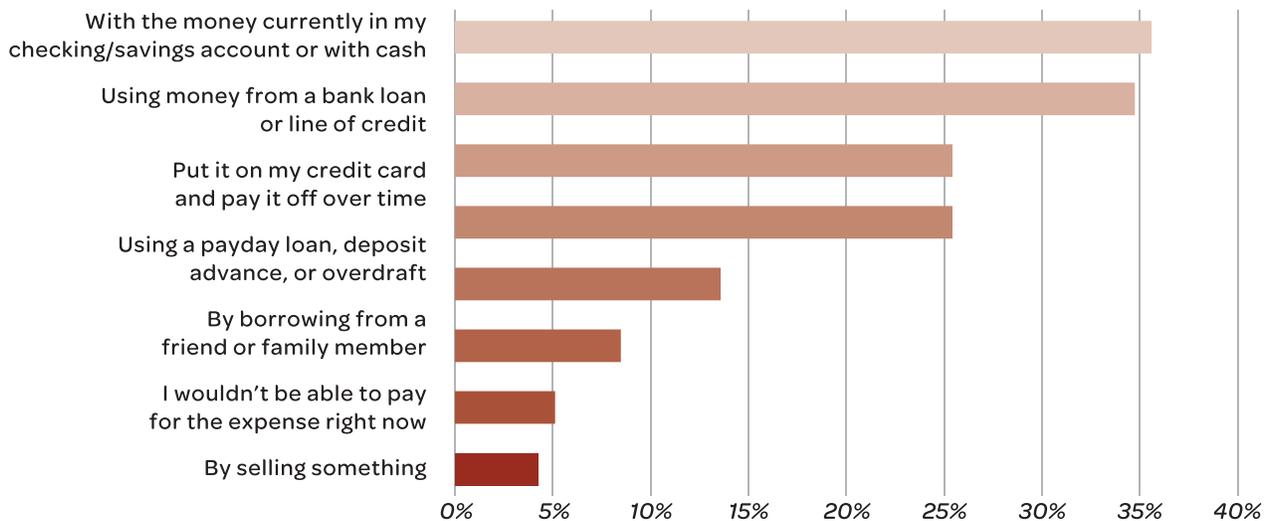
WHAT IS YOUR RACE OR ETHNICITY? *(check all that apply)*



WHAT IS YOUR APPROXIMATE ANNUAL HOUSEHOLD INCOME?

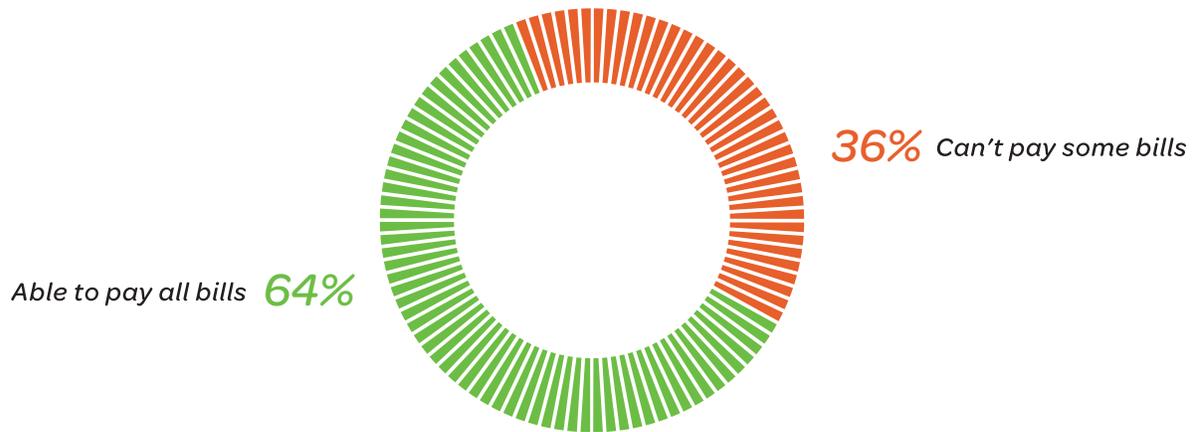


SUPPOSE THAT YOU HAVE AN EMERGENCY EXPENSE THAT COSTS \$400. BASED ON YOUR CURRENT FINANCIAL SITUATION, HOW WOULD YOU PAY FOR THIS EXPENSE? *(if you would use more than one method to cover this expense, please select all that apply).*

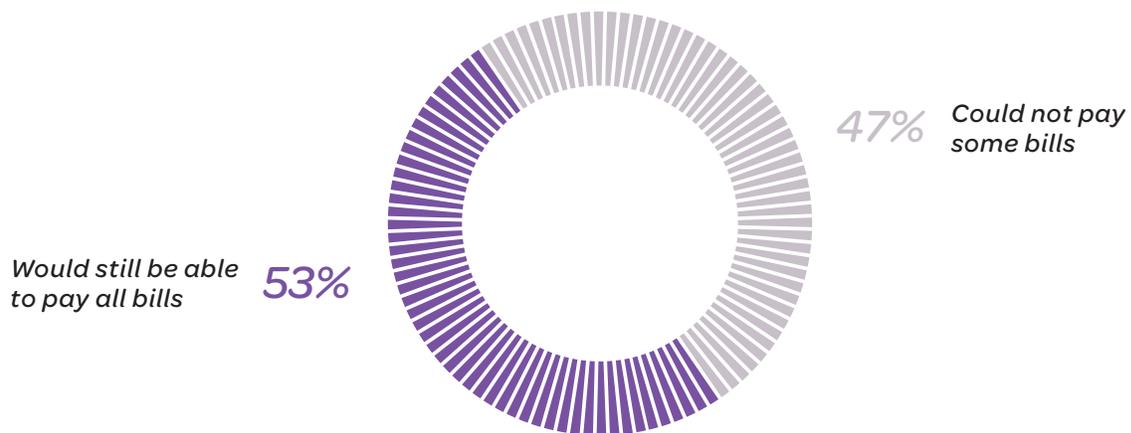


APPENDIX B: SURVEY RESULTS *(continued)*

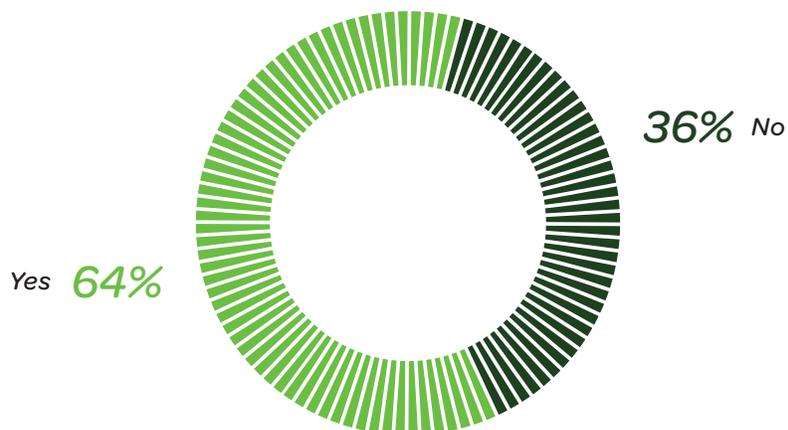
WHICH BEST DESCRIBES YOUR ABILITY TO PAY ALL OF YOUR BILLS IN FULL THIS MONTH?



HOW WOULD A \$400 EMERGENCY EXPENSE THAT YOU HAD TO PAY IMPACT YOUR ABILITY TO PAY YOUR OTHER BILLS THIS MONTH?



HAVE YOU ACCESSED PANDEMIC-RELATED FUNDING PERSONALLY OR FOR YOUR BUSINESS? *(e.g., unemployment benefits, PPE loan)*



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