

TO: Interested Parties
 FROM: Global Strategy Group
 DATE: December 4, 2019
 RE: Child Care Providers Survey Finds Many Programs at Max Capacity, Struggling to Pay Staff

Below are key findings from a survey conducted on behalf of Raising NY among 400 child care providers in New York State. The results indicated that many child care centers and family child care providers – particularly for infant care* – are at or approaching their max capacity. In addition, many programs currently have wait lists.

KEY FINDINGS

There is a major capacity problem for infant care across New York State.

- Infants are the biggest driver of the capacity issues facing child care providers. Seven out of 10 (70%) child care centers and half (49%) of family child care providers are at max capacity for infants.
 - 83% of family child care providers and 64% of child care centers enroll infants. The child care centers that do enroll infants typically have six or more, compared to five or less among family providers.
 - The New York City suburbs is the only region in New York State without a majority at infant max capacity, with 41% of providers saying they are at maximum capacity for infant care.
 - Predominantly rural areas in upstate report the bleakest numbers, with 72% at max capacity for infants. Only 6% of providers in these areas do not report being “at or near” maximum capacity.
- Issues around capacity are less dramatic – though still significant – for older children; 26% of family-based providers and 35% of child care centers are at capacity for toddlers, and only 15% of family-based providers and 25% of child care centers are at max capacity for 3 to 5-year-olds.

At “Maximum Capacity”	NYC Suburbs	West/Central NY Urban & Suburban Areas	Predominantly Rural Upstate	Albany Area	NYC
Infants	41%	65%	72%	64%	51%
Toddlers	21%	30%	32%	27%	30%
3 to 5-Year-Olds	20%	14%	13%	15%	20%

Most child care centers and nearly half of all providers have a wait list.

- A near majority (48%) of child care providers have a wait list for entry to their program. This is particularly problematic for child care centers, as almost two in three (64%) currently have a wait list (compared to 43% of family child care providers).
- Overall, providers in the Albany area are most likely to have a wait list for their program (58%).

	NYC Suburbs	West/Central NY Urban & Suburban Areas	Predominantly Rural Upstate	Albany Area	NYC
Yes, has a waitlist	44%	48%	49%	58%	49%

* For family providers, infants are defined by New York State as children up to 24 months old and toddlers are children 24 to 36 months old; for center-based providers, infants are children up to 18 months old and toddlers are children 18 to 36 months old.

Many providers are running on a deficit, and wages and benefits are a problem for a majority of child care centers.

- Child care providers who enroll at least one child with a subsidy are more likely to have a deficit (30%) than those who do not (14%).
- One out of four (23%) providers report running on a deficit, including 27% of family child care providers and 17% of child care centers.
- Competitive salary and benefits create a significant challenge for both family child care providers and child care centers.
 - Almost half (45%) of providers – 40% of family child care providers and 58% of child care centers – say they are unable to offer their staff competitive benefits.
 - 40% of providers – 34% of family child care providers and 55% of child care centers – say they are unable to give staff raises.

Providers feel low wages limit their ability to provide quality care and believe more assistance from the state is needed to be financially stable.

Below are quotes from providers addressing the financial stability of their programs in their own words:

- “[We need] a livable wage for the provider and employees, benefits for staff and [an] increase in funding in the revenue we do have.” (New York City)
- “The minimum wage has gone up but we’re not getting more money, so how are we supposed to pay our staff?” (West/Central NY Urban & Suburban Areas)
- “Childcare and teaching need to be recognized as a profession. We should make as much as nursing – we have multiple lives in our hands every day.” (West/Central NY Urban & Suburban Areas)
- “We have a quality program that needs adequate funding to meet all the needs of the children.” (West/Central NY Urban & Suburban Areas)
- “It is important for us to be able to offer families affordable care and meet their needs.” (NYC Suburbs)

And below is a word cloud representing providers’ collective responses:



ABOUT THIS POLL: Global Strategy Group conducted a survey of 400 child care providers in New York State from a list of all family – and center – based child care providers in New York State from publicly available sources. The list was dialed at random from September 25th-30th, 2019 and included a representative mix of region and provider type. The margin of error at the 95% confidence level is +/- 4.9%. The margin of error on sub-samples is greater.

RAISING NY REGIONAL BREAKDOWN:

NYC Suburbs: Nassau, Putnam, Rockland, Suffolk, Westchester (15% of all interviews: 14% of all Family Child Care interviews/18% of all Child Care Center interviews)

West/Central NY Urban & Suburban Areas: Columbia, Erie, Monroe, Onondaga, Ontario, Rensselaer, Schenectady, Tompkins, Warren (12% of interviews: 12% of Family Child Care/13% of Child Care Centers)

Predominantly Rural Upstate: Allegany, Broome, Cattaraugus, Cayuga, Chautauqua, Chemung, Chenango, Clinton, Cortland, Delaware, Essex, Franklin, Fulton, Genesee, Greene, Hamilton, Herkimer, Jefferson, Lewis, Livingston, Madison, Montgomery, Niagara, Oneida, Orleans, Oswego, Otsego, Schoharie, Schuyler, Seneca, St. Lawrence, Steuben, Sullivan, Tioga, Washington, Wayne, Wyoming, Yates (12% of interviews: 13% of Family Child Care/8% of Child Care Centers)

Albany Area: Albany, Dutchess, Orange, Saratoga, Ulster (6% of interviews: 5% of Family Child Care/ 8% of Child Care Centers)

New York City: New York City (55% of interviews: 56% of Family Child Care/52% of Child Care Centers)